

Purchasing Services Checklist
Procurement & Contract Services
University of Alaska Fairbanks

✓ Essential Information – to be provided by the department

1. Scope of Work (SOW): Describe the work that is to be performed, and specifically identify the significant components. Where is the work to be performed (US or foreign)? The SOW doesn't have to be long, but it should clearly describe the work (see next page). Note: A proposed scope of work from the contractor does not necessarily constitute the SOW. It is the department's responsibility to specify the service requirements.

2. Period of Performance: What is the expected life of the contract; the beginning date and end date? If work has already begun, you must provide an Unauthorized Purchase Approval Form. (See link: http://www.uaf.edu/files/purch/ua_form.pdf)

3. Type of Contract: Is the contract Firm-fixed price or a cost-reimbursable contract? Combo (fee may be fixed, but includes reimbursements, such as travel, supplies, etc.)? NTE (Not to Exceed)? If any travel is involved, those costs should be included in the REQ, not handled separately on a different REQ or through a Travel Card or T/A (Travel Authorization).

4. Rates: Rate can be hourly, daily, weekly, or monthly. The rate should "roll up" to the total dollar value of the contract. Are we paying monthly or lump sum at the end of the contract?

5. Deliverables/Vendor Responsibilities/Milestones: What is the product to be provided (e.g. a report, memorandum, electronically)? When will the product be delivered (on a schedule?), and to whom and what address (physical/email). How will you determine that the work is complete (e.g., percent complete?) Are there performance standards? Delivery date on the REQ would be either the last day of service or date deliverables are due.

6. Vendor Justification: If the service is over \$5,000, what is the reason(s) a particular vendor/service provider is selected? If the project is for Research, a Restricted Specification Form should be completed.

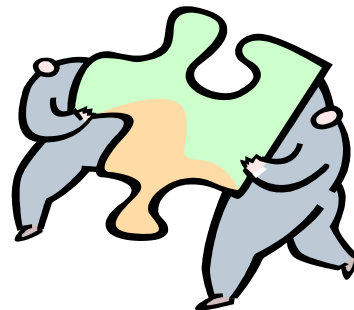
7. Intellectual Property Issues: Are there confidentiality agreements, patent and/or trademark rights issues, or potential violations of patents and/or trademarks?

8. Special Terms and Conditions: if applicable, such as travel, prepayment of fee, security clearance, etc.

9. Independent Contractor Form: If a vendor is new, sole proprietor and/or not incorporated, likely they will need to complete an ICF. Vendor completes first half, department completes the second half. Must ask if vendor has employees-AK law may require Workman's Compensation Insurance.

Have a question? Contact:

Terry Rahlfs
Procurement & Contract Services
474-6471 / trahlfs@alaska.edu



What makes a good Statement of Work (SOW)?

What is a SOW?

A Statement of Work describes the work to be performed and includes a timeframe necessary for the completion of the work. A well written SOW allows the vendor or contractor to provide a detailed response, with a realistic cost estimate. The goal is to allow the other party to understand what is expected of them and what should be included in the finished product.

Elements of a SOW

A good Statement of Work should include the following elements:

- A detailed description of the work to be performed
 - Clearly state what you want the contractor to achieve and deliver.
 - Will travel be required to complete the work?
 - Is there a specific number of times something needs to be done" (i.e. interview 10 subjects)
- Period of Performance - When do you want this work to start and end?
- The rate (or rates) should be clearly defined, or reimbursements estimated.
- The contract type is either a firm-fixed price or a reimbursement, or can be a combination (i.e. \$25 per hour for labor + travel reimbursement)
- Deliverables
 - Include a timeline of major deliverable due dates
 - Fixed dates
 - Flexible dates (i.e. Two weeks after some event occurs)
 - Include milestones as necessary so that the work can be monitored to ensure that you are getting what you need and the quality of the work is as expected.
- Special requirements
 - Travel
 - Security Clearance required
 - Special skills or knowledge
 - Resources

Remember to include

- Specific language
 - Don't leave room for interpretation
 - Use language everyone can understand
- A definition of completion
 - If a final product is submitted, what constitutes acceptance?
- Payment terms
 - Tie to milestones - payment can be tied to acceptance of the product?
 - Based on monthly invoices?
 - Lump sum at the end of the project?