

**University of Alaska Fairbanks
Procurement & Contract Services
Professional Services Checklist**

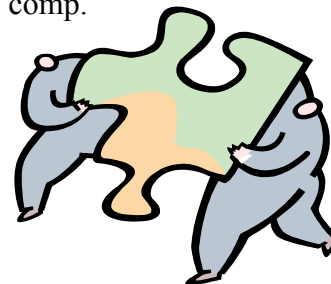
✓ **Essential Information – to be provided by the department:**

- ___ 1. **Scope of Work (SOW):** Describe the work that is to be performed, and identify the significant components. Where is the work to be performed (US, foreign country, etc.)? The SOW doesn't have to be long, but it should clearly describe the work; see attached SOW description sheet. Note: A proposed scope of work from the contractor does not constitute the SOW. The department should specify what it wants from a contractor, and the purchase order/contract must specify those requirements.
- ___ 2. **Period of Performance (POP):** What is the expected life of the contract (the beginning and end dates)? If work has already begun, you must provide an Unauthorized Purchase Approval Form. This form can be downloaded at: http://www.uaf.edu/files/purch/ua_form.pdf
- ___ 3. **Type of Contract:** Is the contract a fixed-price contract, a cost-reimbursable contract or a combination (the fee may be fixed but includes reimbursements such as travel, accommodations, etc) of the two?

Please include the following applicable information for the type of contract involved: the rate of pay (e.g. per hour, per day, per job, etc); the billing rate (e.g. amount to be invoiced monthly or upon completion, etc); the NTE (Not to Exceed) amount; other pertinent information. If any travel is involved, those costs should be included in the REQ and not handled separately on a different REQ or through a Travel Card or T/A (Travel Authorization).
- ___ 4. **Deliverables/vendor responsibilities/milestones:** What product to be provided (e.g. a report, memorandum, white paper?) When will the product be delivered (on a schedule?) and to whom at what address (physical/email), if specific? How will you determine that the work component has been completed (e.g. per cent complete)? Are there performance standards?
- ___ 5. **Billing Rates:** Is it hourly, daily, weekly, or monthly? The rate should be tied to the total dollar value of the contract. Are we paying a lump sum at the end or a monthly billing paid upon invoice submittal?
- ___ 6. **Intellectual Property Issues:** Are there confidentiality agreements, patent, and/or trademark rights issues or potential violations of patents and/or trademarks?
- ___ 7. **Special Terms and Conditions:** If applicable, include any special terms or conditions such as travel and accommodations (who pays), security clearance, prepayment of fee, etc.
- ___ 8. **Independent Contractor Form (ICF):** If the vendor is the sole proprietor and not incorporated, they will most likely need to complete an ICF. The vendor completes the first half and the department completes the second half. Ask if the vendor has any employees. If they do, AK law then requires workman's comp.

✓ Have a question? Contact:

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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?
- 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?