

Guide For Writing a  
Specification or Scope of Work

1. What is the purpose, goal or objective of this procurement?

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2. What are the significant materials or services to be delivered? (Attach detailed specification or Scope of Work)

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3. Is the item or service to be purchased considered proprietary or only available from one vendor? (Sole source justification required)

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4. What is the estimated cost of the materials or services to be provided?

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5. Who is the primary contact person and their phone number?

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6. Who is the intended contract administrator and their phone number?

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7. When is the contract expected to begin?

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8. When is the contract expected to end?

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9. How will project completion or acceptance be defined?

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10. What is the address of the location where services are to be provided?

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11. What are the building access or delivery issues, if any?

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12. Will it be necessary to conduct a pre-solicitation site visit for interested vendors?

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13. Will the contractor be working on agency property? (Insurance required)

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14. What, if anything, will be installed?

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15. Will the installation be required to interface with an existing system? If yes, what is that system?

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16. Will there be a risk of the vendor failing to perform? (Liquidated damages or performance bond may be required)

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17. If the procurement method to be used is a Request for Proposals, what evaluation criteria will need to be used?

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18. Are resumes of contractor staff required?

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19. Are examples of past projects required?

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20. Are references required?

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21. What, if any, warranty provisions need to be included?

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22. What, if any, training will the contractor need to provide to agency staff?

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23. Will the contractor be required to travel for and be reimbursed under the agency's travel policy?

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24. What will the agency be required to provide in the way of services or access?

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25. Will any current equipment be considered for trade-in?

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26. Are there any other issues to be considered?

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## Contract Administration Exercises

### Types of Contracts

1. A contract for an external auditor to conduct various audits of agency departments. The auditor will conduct all types of financial audits; must have knowledge of common financial rules, tax and investment issues, as well as banking rules. Some knowledge of pension rules is desirable. Contractor will also conduct performance audits by looking at how and if the internal departments follow their own policies and procedures. Assume 24 audits of various types per year.
2. A contract for agency-wide janitorial services. The contractor will clean 75% of all agency buildings each workday and the other 25% twice a week. Assume that no weekend service is needed. The agency will furnish paper products and soap to refill dispensers. Contractor will provide all other materials and equipment to use in the cleaning of all facilities.
3. A contract for a consultant to provide advice on solid waste issues for the Public Works department. Consultant will have appropriate experience in dealing with solid waste issues and will provide advice on an as-needed basis, either through meetings, phone calls, emails, etc. Assume five written reports to be furnished annually.
4. A contract for the exterior painting of a city hall complex that includes a four-story administration building with two wings, a two-story fire/rescue building with three (3) vehicle bays and a three-story police department. Each building will have its own color scheme. However, the colors chosen by the city will complement one another. Agency employees and the public must have access to all facilities at all times. No work will be permitted on the weekends.
5. A contract for the construction of a fleet maintenance garage with five (5) service bays. The garage will replace an existing structure next door that will be demolished once everyone is moved into the new facility. Maintenance on all fleet vehicles must continue uninterrupted. Assume eighteen (18) month building schedule.
6. A contract for the repair and maintenance of all agency elevators. Contractor will perform periodic maintenance inspections and repairs on all elevators currently in operation in the agency. Assume 42 elevators are in use and a two hour emergency response time for repairs.
7. A contract for mowing and landscape maintenance services of agency property. The contractor will prepare a schedule of weekly mowing based on the difference in growth rates of grass throughout the year. Consideration should be given to what must be done to each area: mowing, trimming, raking, tree/brush trimming, etc. Assume the agency has 35 parks and 15 other grassy areas that need mowing.

## **Contract Administration Plan**

Think about and create a brief Statement or Scope of Work based on the type of contract given. Then apply it to the items below.

- 1      Description: (what is the contract about?) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
2.      Agency Roles & Responsibilities: (Indicate people/positions & what they will do.)  
a. \_\_\_\_\_  
\_\_\_\_\_  
b. \_\_\_\_\_  
\_\_\_\_\_
3.      Vendor Roles & Responsibilities: (Indicate people/positions & what they will do.)  
a. \_\_\_\_\_  
\_\_\_\_\_  
b. \_\_\_\_\_  
\_\_\_\_\_
4.      Period of Performance/Delivery Dates: \_\_\_\_\_  
\_\_\_\_\_
5.      Data & Deliverables: (any printed matter, reports, discs to be furnished; number of copies to be provided, etc.)  
\_\_\_\_\_
6.      Testing: (what lab or performance testing be required.)  
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\_\_\_\_\_

7. Inspection & Acceptance: (how do we check and approve what we asked for?)

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8. Warranty Provisions: \_\_\_\_\_

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9. Personnel Requirements: (what level of experience is needed to do the work?)

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10. Special Terms & Conditions: (any special requirements or things to consider regarding performance, scheduling and/or cost.)

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11. Watch List Items: (mid level risk items; process or outcome-focused items.)

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12. Critical Milestones: (high level risk items; direct or indirect impact on success.)

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13. Schedules & Meetings: \_\_\_\_\_

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## **Performance Assessment Plan**

In conjunction with the Contract Administration Plan previously completed, create a Performance Assessment Plan to go with it. Remember that a PAP delineates the proposed actions that will be used to evaluate contractor performance. Determine what is important, given the resources available so we can focus on those tasks.

The PAP tells the contractor the following:

1. What tasks will be inspected? \_\_\_\_\_  
\_\_\_\_\_
2. When will the tasks be inspected? \_\_\_\_\_  
\_\_\_\_\_
3. What standards will be utilized? \_\_\_\_\_  
\_\_\_\_\_
4. How will the evaluation & assessment of performance will be made?  
\_\_\_\_\_  
\_\_\_\_\_
5. Who will do it? \_\_\_\_\_  
\_\_\_\_\_
- 6 Surveillance Techniques:
  - a. Sampling: (details what will be checked, acceptable quality level, level of surveillance, sample sizes, sampling selection, performance criteria, analysis of results.)  
\_\_\_\_\_  
\_\_\_\_\_  
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b. Checklists: (specific responsibilities)\_\_\_\_\_

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c. Performance Requirement Summary Lists: (includes tasks, method of surveillance, standards, acceptable quality levels and room for remarks.)

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d. Other Information: (unique terms and conditions such as quality assurance, inspection and acceptance clauses or payment provisions tied to performance standards.)

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Note: not every contract will require everything listed above. Evaluate and determine the need for the item, keeping in mind that if a potential contractor thinks that we will be standing over his shoulder every moment, he may not bid.