

STATEMENT OF WORK TEMPLATE

The Statement of Work (SOW) is a document which describes the scope of work required to complete a specific project. It is a formal document and must be agreed upon by all parties involved. In order to be effective, the SOW must contain an appropriate level of detail so all parties clearly understand what work is required, the duration of the work involved, what the deliverables are, and what is acceptable.

This template may be used to develop the Statement of Work for projects where a specific format is not required by the sponsor, including subawards, research agreements, and consulting agreements.

Introduction/Background

This section should provide a general description of the project as well as highlight the project's background and what is to be gained by the project. The SOW introduction and background are useful to familiarize the other organization with the project.

Scope of Work

This section of the SOW should provide a brief statement of what you expect to accomplish as a result of this scope of work. While specific deliverables and tasks will be presented in the Work Requirements section, this section should highlight what is and is not included in the scope of the project in broader terms.

Period of Performance

This portion of the SOW should define the time period over which the project will occur. The timeframe for the project can be pre-determined or based on a completion date to coincide with some external requirement (such as a Federal award).

Place of Performance

This section of the SOW should describe where the work will be performed by the investigator or consultant. In some cases, an external investigator/consultant may perform all or some of the work on site at UMB. It is important to identify this situation and to clarify information such as equipment and other resources that will be provided. An agreement such as a subaward, consulting agreement, collaboration agreement, or visiting scientist agreement must be in place prior to the external investigator/consultant performing research in UMB facilities.

Work Requirements

Here the SOW should include a description of the actual tasks which the project will require. This should include what tasks need to be completed in order for successful completion of this project/contract. As with all other portions of the SOW, every effort should be made to include as much detail as possible.

Schedule/Milestones/Tasks

This part of the SOW should define the schedule of deliverables and milestones for this project, including such items as data submission, meetings, or progress reports.

Acceptance Criteria

When appropriate for the situation (for example, consultant agreements), this section of the SOW defines how UMB will accept the deliverables resulting from this SOW. The acceptance of deliverables must be clearly defined and understood by all parties. This section should include a description of how both parties will know when work is acceptable, how it will be accepted, and who is authorized to accept the work.

Other Requirements

Any special requirements should be described in this section of the SOW. For example, this section could include requirements for IRB or IACUC approval documentation, training, security requirements, or other expectations that are not listed elsewhere in the document.