



Organization Name

Scope Statement for [Project Name]

Prepared by:

Your Name

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How to use this document

DELETE THIS PAGE and regenerate the Table of Contents when finalizing this document

SCOPE STATEMENT

Department/Agency: [Dept. Name]
Issue Date: [Date]
Project Name: [Project Name]
Project Sponsor: [Sponsor Name]
Project Contact contact must be a state employee
Contact Phone: (xxx)xxxxxxx
Contact Email: xxxxxxxxxxxx
Technology Services Contract Attachment: xxxxxxxxxxxx
Due Date for Statement of Work: [Time & Date]

Scope Statement Purpose

State briefly what this scope statement is for. Keep only this section on this page for clarity

Project Background and Objectives

Briefly describe the background and history leading to the project and this scope statement.

Project Description

DO NOT tell the vendors how to solve the problem. (This forces the vendors to propose their own solutions and explain why the proposed solutions are the most cost-effective and risk-justified for satisfying the objectives under the given criteria.)

Scope and Requirements (optional sub-section)

Use this section to specify requirements, or attach the project requirements Definition Document as an appendix section

Vendor Proposal Requirements (optional sub-section)

Use this section to outline the vendor response document – if the Vendor SOW template is not appropriate.

Timetable/Schedule

Set deadlines for deliverables. Give timeframe for entire project. Define the starting and completion date, if possible. Include any dates that will be significant to project, i.e. “before next fiscal year,” etc.

Vendor Cost Proposal

The intent is to inform vendors of the scope of spending anticipated for the project. Exact numbers are not required; a range may be useful. Set limits to spending. Estimate costs, including total lifecycle or ownership costs or the resulting product/system (not just costs of start-up.) Costs should be based on satisfactory deliverables; not time and materials. Quantify the proposed budget and source of project funding.

Example:

“Vendors are requested to provide a deliverable-based pricing and billing schedule.

The cost proposal must either be a fixed fee rate or a T&M rate with a not to exceed estimate. For T&M proposals, the vendor staffing rate must be a single hourly rate, which will be charged for all work performed in the engagement. This rate shall apply to all work efforts, regardless of type or complexity. It shall apply to all vendor personnel, regardless of required skill or experience levels.

The fixed fee rate, or the single hourly T&M rate shall cover all cost, including direct and overhead expenses. Travel, per diem and other miscellaneous costs must be absorbed in this rate.

Cost Consideration

Vendors are requested to provide any pricing differences for locating support staff onsite or offsite.”

Political or Business Environment

Sometimes it is necessary to indicate the environment of the project if it will affect the vendor’s strategy. Examples of these types of unique environments are: political, business, relations with other government entities, etc.

Example:

“The vendor project team must work with resources from the Department of Transport and the Office of the Secretary of State, as well as trading partners that may be involved in piloting EDI with these agencies.

The vendor project manager will work closely with OIT Program Office which provides management oversight to all e-commerce projects.”

Additional Vendor Qualifications

In this category, list any qualifications vendors will need in addition to the qualifications for eligibility. This is the appropriate category under which to list any special staffing needs you anticipate.

Additional Contractual Terms

If necessary, list any contractual terms or conditions not covered in the mandatory section of the umbrella contract the “Optional Considerations” of the umbrella RFP (assuming there is one) may be very useful in the category.

Example (for deliverable-based costing):

The selected Vendor may be compensated after a satisfactory completion and submission of project deliverables. Vendor invoices shall be supported by a deliverable acceptance document that has been signed off by the project sponsor.

Vendor Liability

If appropriate, indicate any vendor liability anticipated based on risk analysis of the project and possible damage to the state.

Evaluation Criteria

This is an extremely important part of the scope statement because it will be referenced in *ORDER OF IMPORTANCE*. These will vary according to each project.

The selection criteria will not be based on lowest cost, but on the “best value” concept. For this project, “best value” be assessed based on:

Administrative Items

Examples of administrative items would be difference in proposal procedure, such as a project description conference, a certain format for submitting proposals, etc. Important:

- at least 1 hardcopy of the proposal, with an execution page signed by an authorized officer of the corporation should be submitted. You may ask for an electronic copy to be provided as well, to facilitate distribution.

End of Scope Statement