

What is a Scope of Work?

3. Financial Consequences

2. Deliverables

1. Scope of Work

The scope of work is the section of the agreement that identifies the tasks/services the provider will perform for the state. It outlines the services that must be successfully delivered for payment to be made and is defined in FS 287.058 and 215.971.

The scope of work is the most important element of an agreement because it serves as the foundation for accountability and for making payments out of the state treasury.

An effective scope of work should...

Clearly Defined:

- Identify all tasks and services that the provider is required to perform

Specific:

- Provide specific detailed direction regarding the services to be performed and identify the source documentation requirements to demonstrate the completion of tasks

Complete:

- Directly relate to program goals
- Clearly identify the benefit of the state

Without a clear, specific, and complete scope of work it is difficult to:

- Create deliverables which identify the events to be completed before payment can be made
- Create monitoring activities to verify or confirm performance and compliance

The scope of work provides clarity to all parties about expectations and identifies services and tasks required for payment. When writing the scope of work, it is important to consider the audience. Your audience may be:



- A provider who does the work
- A contract manager who enforces the terms and conditions
- Agency's finance and accounting personnel who process invoices
- DFS auditors approving payment
- Legal system personnel
- The public inquiring into how their tax dollars are being spent

Did you know?

You can visit the Florida Accountability Contract Tracking System (FACTS) to review agency's contracts.

<https://facts.fdfs.com/Search/ContractSearch.aspx>



The scope of work answers questions regarding:

- Qualitative standards- who, how, when, and where
- Quantitative standards- how much, how many, and how often (if applicable)

A vague scope of work makes it difficult to identify the mandatory qualitative standards.

Here is an example of a vague scope of work:

Desktop training will be provided in Leon County.

You can improve a vague scope of work by applying qualitative standards: who, how, when and where.

An example of an improved scope of work including qualitative standards is listed below:

Qualitative Standards	Definition	Example
Who?	<ul style="list-style-type: none"> • Who is going to provide/ receive services? • Identifies staffing levels, qualifications, responsibilities, and documentation requirements 	<p>Training USA, LLC will provide a 12-part Desktop Support training program for 25-50 eligible participants on a full-time basis (as defined in Attachment A).</p> <p>Staff will consist of 1 program director and 3 instructors that meet the minimum qualifications (as defined in Attachment A).</p>
How?	<ul style="list-style-type: none"> • The manner in which activities will be performed • Any applicable standards, procedures, laws and rules 	<p>25-50 eligible participants will be provided 120-minute group sessions facilitated by a minimum of 2 Training USA instructors. Group sessions will take place 4 times per month.</p>
When?	<ul style="list-style-type: none"> • When will services take place? • Identifies agreement period • Identifies due dates 	<p>Training will take place during the 2016-2017 fiscal year (July 1, 2016-June 30, 2017) during the week, Monday- Friday, from 2:00 pm to 6:00 pm, excluding state holidays.</p>
Where?	<ul style="list-style-type: none"> • Where will the services be performed? 	<p>Group sessions will be performed at the providers location (123 Heartland Lane, Tallahassee, FL 32222).</p>

Required Documentation

Services must be documented to provide evidence of performance and compliance.

Here is the necessary documentation that the provider will need to maintain as evidence that the tasks were successfully completed per the scope of work:

- Training Curriculum
- Participant Sign-in Sheets (including date, start time and end time, students and instructors' name, and location)
- Monthly Service Level Expectation Performance Report