How to Write a Scope of Work to Expedite Your Procurement Process

UIC UNIVERSITY OF ILLINOIS
AT CHICAGO

Succeeding in Challenging Times

Workshop Presenters

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Workshop Objectives

- Review the components of a good scope of work/services or detailed specifications

- Conduct scope development exercise

- Provide tips for developing a good scope

Goals of a Good Specification

- Establish the minimum acceptable requirements or standard of performance

- Ensure open and fair competition

- Save money

Qualities of a Good Specification

- Clear, concise, complete, and logical
- Considers industry standards or best practices
- Is not restrictive

Benefits of a Good Specification

- Meets the needs of the department

- Promotes competition and improves pricing

- Facilitates evaluation of offers

- Ensures reliability of information and simplification of future orders

- Ensures compatibility with other products or systems

- May help set guidelines for future standardization

Terminology

- Scope of Work or Services
  - General Services
  - Construction Work
  - Professional Services
- Detailed or Technical Specifications
  - Commodities
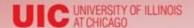 - Equipment
  - Engineering Drawings

Tips to Develop a Good Scope

- **What** – What do you need?

- **Where** - Where is the physical location of delivery?

- **When** – When do you need it?

- **Who** – Who will provide, perform or receive it?

- **Why** – Why do you need it?

- **How** – How will it be provided or performed?

Tips to Write a Good Scope

- Use proper sentence length
- Aim for simplicity
- Be concise and consistent
- Avoid open-ended or ambiguous language
- Use directive language properly

What to Include

- Required physical characteristics
- Performance
- Customization
- Special packaging requirements
- End use of product
- Drawings

Exercise

- **Three Groups**
  - Dream Team
  - Design Team
  - Magic Team