Statement of Work

|  |  |  |  |
| --- | --- | --- | --- |
| **Project Name** |  | | |
| **Client Name** |  | **Consultant Name** |  |
| **Agreement Date** |  | **Version** | 0.0.0 |
| **Project Start Date** |  | **Estimated End Date** |  |

# Summary of Project

[Describe the primary goal of the project—what results are the client and consultant hoping to achieve?]

## Background

[Briefly describe what led to the decision to engage in the project, including meetings held to identify need, possible solution, specific objectives, possible risks, etc.]

## Scope of Work

[Describe in detail what work the project entails. Consider including delivery methods into this description. The goal is to clearly define exactly what work will be done, so that the project team can avoid scope creep, and determine when additional work orders need to be submitted.]

## Objectives

[List the specific and measurable objectives of the project, and include a rationale as to why the objective is needed.]

|  |  |
| --- | --- |
| **Objective** | **Rationale** |
|  |  |
|  |  |
|  |  |

# Tasks / Activities & Schedule

[Each objective should have one or more milestones & deliverables. The schedule should list them along with a Due Date to define the Period of Performance].

|  |  |  |  |
| --- | --- | --- | --- |
| **Task #** | **Task Description** | **Corresponding Deliverable** | **Due Date** |
| 1.1 |  |  |  |
| 1.2 |  |  |  |
| 2.1 |  |  |  |
| 2.2 |  |  |  |

# Project Requirements

[Use this section to identify specific roles and responsibilities between the Consultant and the Client that ensure successful completion. These requirements do not relate to any business, systems, or design requirements developed as deliverables within the project.]

## Consultant Responsibilities

[Call out the specific tasks, roles, materials, or resources for which the consultant has sole responsibility.]

Consultant has the following responsibilities to ensure timely completion of the project:

* Submit deliverables in accordance with agreed-upon schedule.
* Schedule and conduct regular status update meetings with the Client.
* Identify, escalate and share risks and issues with Client promptly.
* Use client-provided equipment and resources in accordance with Client policies and procedures.
* Submit invoicing and receipts in a timely fashion according to schedule.

## Client Responsibilities

[Call out the specific tasks, roles, materials, or resources for which the client has sole responsibility.]

Client has the following responsibilities to ensure timely completion of the project

* Review and decision acceptance of deliverables in accordance with agreed-upon schedule.
* Participate in regularly scheduled and ad hoc meetings with consultant as agreed to support delivery, and as needed to address issues and risk mitigation.
* Provide necessary equipment, including laptops, access badges, and network access as needed for consultant personnel to complete the project.
* Review, approve and pay invoices in a timely fashion.

## Mutual Responsibilities

*[Call out the specific tasks, roles, materials, or resources for which the consultant and the client share responsibility.]*

Consultant and Client share the following responsibilities for the duration of the project:

* Develop and follow communications protocols, including Points of Contact, to coordinate and follow up as needed.

# Project Risks

[During the discussions leading up to the SOW, the client and consultant should have mutually identified some risks that require mitigation planning. Note that additional risks may arise during the project, which may result in change orders or new SOWs.]

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| --- | --- |
| **Project Risks** | |
| **Issue / Risk** | **Mitigation / Contingency** |
|  |  |
|  |  |
|  |  |

# Standards and Compliance

[Depending on the type and complexity of the project, the consultant may have to develop plans for, and/or ensure compliance with various corporate standards, as well as regulatory issues.]

## Communications Plan

[Most projects should include a communications plan that describes how facets of the project will be communicated to stakeholders, the project team, and impacted users. Look for existing communications planning requirements from the client, and reference them here. If applicable, note that a communications plan is an identified deliverable.]

## Quality Management Plan

[Most projects include a quality management component that governs quality assurance and testing activities. Look for existing quality management requirements from the client, and reference them here. If applicable, note that a qualify management plan is an identified deliverable.]

## Training Plan

[If impacted users and other stakeholders require training to realize the benefits of the project, include a reference here, noting any client-provided standards or guidance, and whether this is a project deliverable.]

## Standard Compliance

[The client may have specific standards around project management and/or the deliverables of the project. They should be noted here.]

## Regulatory Compliance

[Identify any local, state, or federal regulations that impact the project delivery, and summarize how the project will address the requirements (i.e., through development and adherence to risk mitigation plans, timely submission for regulatory approval, etc.).]

## Privacy & Security Adherence

[Summarize the privacy requirements that the project will be impacted by, or have impact upon, including protection of personally identifiable data, confidential and proprietary information, or government secrecy classifications.]

# Business Terms / Conditions

## Contract Modifications

[Summarize the actions the consultant and client must take to modify the SOW / contract, such as formal change order processes.]

## Confidentiality

[Summarize consultant and client responsibilities with regard to confidentiality, and reference accompanying non-disclosure agreements.]

## Termination

[Describe under what conditions the SOW / contract may terminated by either the consultant or client, and how termination would occur.]

# Comments and Approval

[Describe who will have the authority to approve deliverables, changes or new work orders. Include any additional information on the project manager, and the client’s assigned point of contact.]

# Authorization

|  |  |  |
| --- | --- | --- |
| **Authorization** | | |
| **Client** | **Signature** |  |
| **Printed Name** |  |
| **Title** |  |
| **Date** |  |
| **Consultant** | **Signature** |  |
| **Printed Name** |  |
| **Title** |  |
| **Date** |  |