



Office of State Procurement

Professional Services Contract Statement of Work

Agency Training



Objectives

- Discuss what the core substance of a contract is.
- Understand what goals, deliverables, performance measures and monitoring plan are in a statement of work
- Apply goals, deliverables, performance measures and a monitoring plan in a statement of work
- Remember goals, deliverables, performance measures and a monitoring plan





Statement of Work

The statement of work is your core substance of a contract.

Purpose – what the contract, project, or grant will do and for whom the contractor will do it.

Includes the goal/objective, deliverables, performance measures and a monitoring plan.



Goals/Objectives

Goals – Broad, general intentions, intangible

Establish direction and destination, describe the general end results toward which effort is directed

Objectives – Narrow, precise, tangible

Specific, measurable targets

Both are mindful of the purpose of the contract, project or grant.





Goals / Objectives examples

Goal –increase productivity of departmental employees

Objective –send 100% of the staff to a time management class

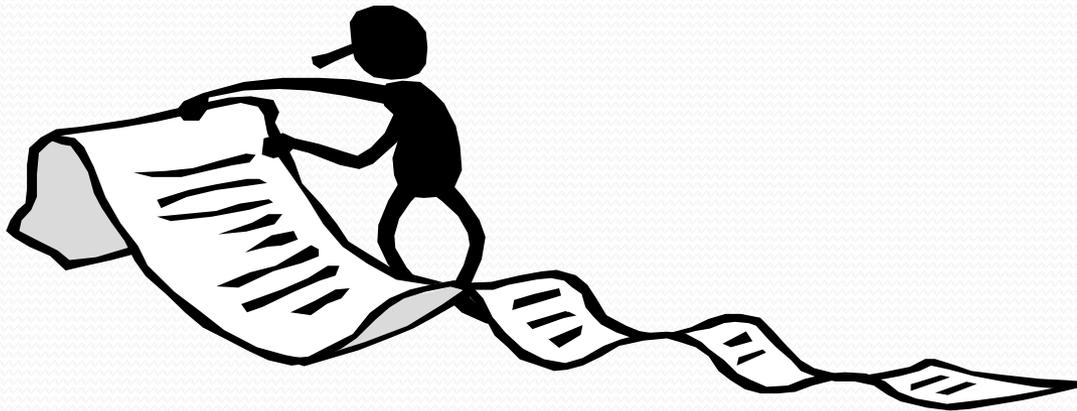
Goal –provide educational opportunities to Louisiana workers to secure and retain jobs

Objective –provide twelve (12) classes in welding and woodworking to recently laid-off workers at ABC company



Deliverables / Outcomes

List of tasks the contractor is going to provide.





Deliverables / Outcomes examples

- Submit samples taken during an investigation to a certified laboratory for lead analysis within 24 hours of the investigation.
- Within 3 days after receipt of the lab analysis results, the contractor will call the agency to provide an initial outline of the hazards and probable remedies.
- Send a copy of the Risk Assessment Report to the agency within 21 days after receipt of the results analysis.



Deliverables / Outcomes examples cont.

- Conduct kick-off meetings with the project manager.
- Conduct monthly status update meetings with the project manager and provide written reports
- Conduct gap analysis based on analysis of current state operations, organizational and operational capabilities
- Develop and deliver presentation/report to the agency that is inclusive of assessment activities
- Identify duplication and/or overlap in functions and responsibilities that may exist within the agency.



Performance Measures

Tools used to verify and track performance

Should be measurable & time bound

Established in advance, are specific targets and should be simple and understandable



Performance Measures Examples

- Schedules with due dates
- How many employees or clients were trained by a specific date
- Number of revisions to the proposed plan
- Response time of 48 hours on request for a legal opinion
- Number of persons who were able to get a job after receiving education training and counseling

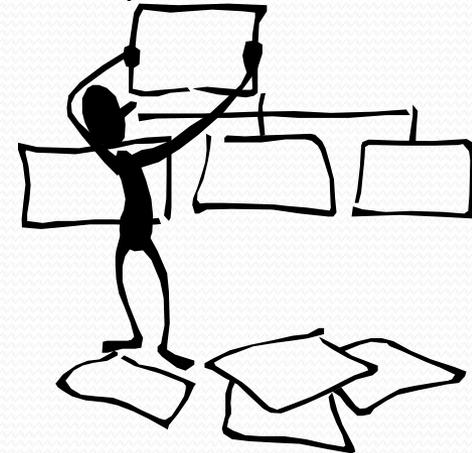


Monitoring Plan

Who will monitor performance? (unique title)

How and with what frequency will performance be monitored? (monthly, weekly, in meetings by telephone, written reports, emails, etc.)

How will performance data be validated (or audited) to ensure accuracy?





Monitoring Plan example

The contractor will be monitored by the program evaluator, on a weekly basis by determining the number of students attending the training. The contractor will provide sign-in sheets (excel format) for validation purposes.



Monitoring Plan example

The contract will be monitored by the Director of Health Services and Nursing

Each invoice will be reviewed for accurate dates for billing of after-hours on-call coverage

Each visit, treatment, and consultation will be recorded in the individual's facility record

The contract monitor will conduct biannual meetings either in-person or by telephone to review progress and/or issues on the contract



Monitoring Plan example

The contract will be monitored by the Program Manager

The monitor will review a monthly report to determine the number of days a report has been assigned to the contractor

Review the accuracy of information entered by the contractor, as well as the percentages of disability approvals and denials.

Receive and review monthly invoices submitted by the contractor and ensure timely transmission to fiscal staff for payment of services rendered

Provide oversight of contract funding throughout the life of contract



QUIZ!



1. Print approximately 350 copies of the manual for attendees at the training sessions.
2. Create an Energy Code Training webpage.
3. The code training program will focus on training home builders and designers on how to comply with the Energy Conservation portion of the 20019 IECC.
4. Improve literacy outcomes through the development of a systematic PD framework of evidence-based practices.



QUIZ!



5. Create and maintain a District Level Team.
6. Meet quarterly with the District Level Team.
7. Submit agenda's and sign in sheets from quarterly meetings.
8. The results of activities and the outcome of data throughout the project will be shared with the staff on a bi-monthly basis via emails, conference calls or face-to-face meetings.



QUIZ!



9. Provide educational opportunities to Louisiana workers to secure and retain jobs by conducting 12 classes in welding and woodworking to recently laid off workers at ABC Company.

10. Meet quarterly with the Executive Director or designee to assess the completion of tasks assigned during the quarter.



Quiz Answers

1. Deliverable
2. Deliverable
3. Goal
4. Goal
5. Deliverable
6. Performance Measure
7. Performance Measure
8. Monitoring
9. Goal
10. Monitoring





Office of State Procurement

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