



Washington State  
DEPARTMENT OF  
ENTERPRISE SERVICES

# Statement of Work Workshop



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# INTENTIONS OF THIS WORKSHOP

- Why is this important
- Learning How to Develop a Statement of Work
- Describing various parts of a Statement of Work
- Understanding how the Statement of Work might change



# INTRODUCTIONS AND DISCLAIMER



# AGENDA

- Why is this Important?
- Statement of Work Overview
- Why These Matter?
- Who Does What?
- Statement of Work parts
- 2 Ways to Develop a Statement of Work
- Using a Statewide or Cooperative Contract
- Wrap Up
- Resources
- Questions and Answers



# WHY IS THIS IMPORTANT



# STATEMENT OF WORK

## WHAT IS IT?

- Outlines the Agreement between Purchaser and Contractor
- Defines the scope, and the who, what, when, where, how, and terms of payment.
- Used throughout the process: development, solicitation, and implementation (the contract).



# WHY DOES IT MATTER?

Statement of Work is the foundation

Scope –  
Clarifies what the purchase  
involves and includes.



Statement of Work –  
Provides an expansion on the  
Scope.



# WHO DOES WHAT?

Project or Program Expert- provides the outline of the purchasing needs.

Procurement Expert- takes the draft Statement of Work and finalizes it into the contract.

# **BREAK - QUESTIONS AND ANSWERS**



# PARTS OF A STATEMENT OF WORK: THE SCOPE

Context /  
Background

What is  
being  
purchased?

What is not  
included?

Defines the 'shape' or boundaries of the purchase



# PARTS OF A STATEMENT OF WORK: WHO

- Contractor vs Purchaser
- Task Assignments
- Approval and Acceptance
- Review Points
- Substitution and Qualifications



# PARTS OF A STATEMENT OF WORK: WHAT

Specifications

Performance  
Criteria /  
Results

Acceptance  
Criteria

Assumptions

Level of  
Services



# PARTS OF A STATEMENT OF WORK: WHAT - DELIVERABLES

Actual Work Product / Specific Output

Measurable /  
Verifiable

Tangible /  
Intangible

Acceptance  
Criteria are  
Defined

Tie to Payment /  
Accountability



# PARTS OF A STATEMENT OF WORK: WHEN

Key deliverables and  
timelines are outline



# PARTS OF A STATEMENT OF WORK: WHERE

- Location of the Work
- Security Requirements
- Travel Guidelines



# PARTS OF A STATEMENT OF WORK: HOW

Consider Risks and Strategies



Required  
Certifications



Performance  
Criteria



Security  
Measures



# PARTS OF A STATEMENT OF WORK: TERMS OF PAYMENT

- Outlines how and when
- Tie payments to performance
- Protects purchasers through accountability

# **BREAK - QUESTIONS AND ANSWERS**



# TWO WAYS TO DEVELOP A STATEMENT OF WORK

## 1. Purchaser knows exactly what they want

In this instance, the SOW will clearly identify all parts:  
who, what, when, where, how, & terms of payment.

The final SOW in the contract will remain the same



# CONTINUATION - TWO WAYS TO DEVELOP A STATEMENT OF WORK

2. Purchaser has a problem  
they need to have solved

In this instance, the SOW in the solicitation will define the problem and goals, and ask bidders to propose the who, what, when, where, how.

The final SOW in the contract will be combination of these.



# QUESTIONS AND ANSWERS



# PURCHASING UNDER A STATEWIDE OR COOPERATIVE CONTRACT

- Well-defined Statement of Work
- Purchase Order helps understand the needs



# WRAP UP

Statement of Work outlines what is expected

Clear understanding for both parties

Scope clarifies the boundaries of any purchase

Statement of Work provides an expansion...



# RESOURCES

- Washington State Procurement Manual:  
[DES WA State Procurement Manual](#)
- NIGP resource:  
[Scope of Work and Statement of Work](#)
- NASPO Procurement U:  
[Introduction to Scopes of Work](#)

# Question and Answers - Poll



# THANK YOU



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