This Scope of Work (SOW) is attached and incorporated to the Agreement for Direct

Charitable Activity Services of Independent Contractor (the “Agreement”) between

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** (“Contractor”) and **THE CALIFORNIA ENDOWMENT**

(“The Endowment”). This SOW is subject to the terms and conditions contained in the Agreement between the parties and is made a part thereof.

# Introduction/Background[[1]](#footnote-1)

[A brief statement of what you expect to accomplish as a result of this SOW. While specific deliverables and tasks will be presented in the Work Requirements section below, this section should highlight what is included in the scope of the project in broader terms.

Briefly describe in one paragraph the program area, the campaign that this SOW will support and the primary drivers of change.]

## Project (Includes Timeframe/Period of Performance)

[In order to be effective, the SOW must contain an appropriate level of detail so all parties clearly understand what work is required to implement and complete the project, the duration of the work involved, what the deliverables are, and what is an acceptable performance or deliverable. The level of detail, clarity, and identification of performance objectives and expectations in the SOW drive all other conditions of the DCA contract, from pricing structure, to the Contractor’s entitlement to payment, and to the level of contract monitoring. The SOW should provide a general description of the project as well as highlight the project’s background and what is to be gained by the project.

Scope of

Work (template)

If the SOW contains multiple projects or phases, discuss each project or phase separately as outlined in below:

1. Project 1: - Title and Project Details
   * Timeframe: List date(s) or date range(s) when it will occur and be completed.
   * Personnel: Names of Essential Personnel, Associated Companies or Subcontractors and an estimate of the number of hours each person will work.

1. Project 2: - Title and Project Details
   * Timeframe: List date(s) or date range(s) when it will occur and be completed.
   * Personnel: Names of Essential Personnel, Associated Companies or Subcontractors and an estimate of the number of hours each person will work.

Define the time period over which the project will occur. The timeframe for the project can be pre-determined or based on a completion date to coincide with some external requirement. It is important to define the period of performance since this is usually a variable in the project’s cost. Sometimes the time period will be categorized as phases. The time period can be projections or based on the occurrence of an event.]

# Work Requirements/Deliverable Materials

[Describe the actual tasks which the project will require. This should include what tasks need to be completed in order for successful completion of the project/contract. As with all other portions of the SOW, every effort should be made to provide a detailed description.]

**Deliverables**

[The SOW should contain a defined schedule of deliverables along with any other important interim project milestones. “Deliverables” is defined as the goods, products, services, work, work product, items, materials and property to be created, developed, produced, delivered, performed or provided by or on behalf of, or made available through, the Contractor (or any agent or subcontractor of Contractor) in connection with the project. All milestones, tasks, and schedule information should be as accurate as possible since the Contractor will need to consider these items in the negotiations. When specific deliverables or the timing of delivery are not known, provide estimates and describe:

* the nature, extent, and reasons for the uncertainties;
* the confidence level in any estimates provided;
* the events that will lead to the removal of uncertainties;
* how this will be communicated to The Endowment;
* the process for ensuring authorization from The Endowment before work commences; and
* the form for ensuring this authorization is evidenced in writing (i.e., authorization form).]

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| --- | --- |
| Deliverables | Due Dates |
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# Acceptance of Deliverables Criteria

[Define how The Endowment will accept the deliverables resulting from this SOW. The acceptance of deliverables must be clearly defined and understood by all parties. This section should include a description of how both parties will know when work is acceptable, how it will be accepted, and who is authorized to accept the work.]

# Completion Criteria and Reporting Requirements

Contractor shall have fulfilled its obligations when the following occurs:

 Contractor accomplishes the activities described within this SOW, including delivery to the Endowment of the materials listed in the “Deliverable Materials” section and The Endowment accepts such activities and materials without unreasonable objections. No response from The Endowment within (fourteen) 14 business days of deliverables being delivered by Contractor is deemed accepted.

[Note that the Program Manager can change the response timeframe above to whatever is appropriate for the project.]

# Assumptions

[If applicable, list all assumptions. If not, then remove this section, including the title. Examples of assumptions include whether the Contractor is to use his/her own materials/tools to complete the project; perform work at their offices, etc.]

1. The Program Manager can be extremely helpful in providing drafting assistance to the Contractor with describing the program. [↑](#footnote-ref-1)