



Pennsylvania State System of Higher Education
Indiana University of Pennsylvania
Procurement Services

Writing a Work Statement for the Request for Proposal (RFP)
General Guidelines
Part II of the RFP template

The evaluation team member should follow the instructions specified in Part II of the RFP template to complete the Work Statement. The following tips are offered as general guidelines for providing greater clarity to the requested information in the template.

Importance of the Work Statement

The Work Statement determines, to a great extent, the probability for a contractor to satisfactorily complete the goals of the resultant contract. Further, the Work Statement emphasizes considerations, applications, and options important to the university, such as the methods and mechanics of executing the activity or work specified in the Work Statement, and the willingness to accept a value pricing (i.e., fixed price) contract. In addition, it stresses the expected technical and professional excellence, contractor creativity, and timeliness (for reporting interim progress or final delivery of the deliverable). It represents the foundation on which the contract is implemented and the objective measure on which satisfactory completion is based and payment justified. The Work Statement serves as a baseline to measure progress and contract change requirements throughout the performance of the contract. Thus, the Work Statement represents the primary supporting document to the contract and forms the basis for a contractor's response to the RFP.

Design or Performance Work Statement

The most important part of the RFP is the Work Statement specifications. Like design or performance specifications used in the procurement of commodities, the Work Statement for a contract can be design or performance based. A design based Work Statement states what is required and how that requirement will be fulfilled. The University uses this type of Work Statement when it desires strict control of the specific methodology applied in the performance of the contract. This control, however, can contribute to greater direct costs, restrictive competition (when the award is not made on a single or sole-source basis), and higher indirect costs associated with compliance monitoring. Equally, a performance based Work statement describes the nature and scope of an issue or problem as well as the preferred results from exercise of the performance criteria, quality assurance requirements or provisions, delivery schedule, and other variables (e.g., time and place for performance). The Work Statement in the resultant RFP, allows the contractor maximum flexibility to select the most cost effective and efficient methodology to accomplish the activity or work.

Use Plain English

Evaluation team members should compose the Work Statement in a language plainly understandable to the potential contractor. Unambiguous language is essential because of possible misinterpretation by a contractor and courts generally rule against vague service contracts. (The RFP and the Supplier's responses to an RFP define the contract.) When developing the Work Statement, evaluation team members should:

- State activity or work requirements plainly, logically, and in chronological order.
- Include graphics (e.g., illustrations, diagrams, tables, and charts) to assist in describing the activity or work and the related requirements.



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- Avoid words that allow for multiple interpretations (e.g., "include," "average," "adequate," and "or equal").
- Employ plain words and phrases (no obscure technical jargon) in concise and simple sentences. A Work Statement written for IT consultants, however, may include technical jargon because high-tech consultants have an inferred understanding of the descriptive technical terms and the context in which they are used.
- Use "shall" to express a mandatory condition; use "will" to state a declaration of purpose or intent.
- Emphasize the active rather than the passive voice.
- Select verbs that identify activity or work specifications (e.g., "analyze," "attend," and "audit") and those that answer explicit questions.
- Avoid "and/or," "any," and "either" because these words imply that the contractor may make a choice, which could conflict with the intent of the Work Statement.
- Replace pronouns and repeat nouns to preclude any misinterpretation.
- Use the same phrase or word, especially when referring to technical terms or items.
- Avoid "catch-all" phrases (i.e., "to the extent necessary," "as required," or "as applicable") because they confuse the scope of the issue or problem.
- Spell out acronyms and abbreviations the first time they are used and put the abbreviated version in parentheses after the spelled-out phrase.

Eliminate Subjectivity

A clear and detailed Work Statement will eliminate any subjectivity in determining if the contractor is legally and properly implementing the provisions of the contract. In addition, including project details in the Work Statement will uncover issues and problems that members of the evaluation team can address prior to the completion of the Work Statement. A detailed description of the project's scope; requirements, expectations, and goals; and performance criteria will avoid the cost and annoyance of attempting to modify the contract during or after the implementation.

In Summary

One of the primary reasons for developing a clear and detailed Work Statement is to allow a quick response to the University's RFP from any potential contractors. Whether design or performance based, a detailed Work Statement should minimize the time required to submit an effective proposal at a reasonable price. The Work Statement and the Contractor's response to the RFP are the basis for the contract. Your clear and concise wording of the Work Statement will result in a clear and concise contract.