STATEMENT OF WORK

**UCI Purchase Order #\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**-----This template is to assist you in developing your Low-Risk Procurement PO.-----**

**This document is not for purchases requiring a bilaterally signed agreement or for Information Technology purchases.**

**See** [**Low-Risk Procurement**](https://procurement.uci.edu/contracts/low-risk-procurements.php) **to see what qualifies.**

This Statement of Work (“SOW”) is issued pursuant to Purchase Order # \_\_\_\_\_\_\_\_\_\_ issued by UC to Supplier (together the “Agreement”).

# Scope of Services

Provide an overview and background of Goods and/or Services to be provided. Succinctly describe the problem that this service will address and briefly give the goal(s) and how the goal(s) will be met. Please be brief – 2-3 sentences. For example, “Supplier will provide…”

# Term of SOW

This SOW will begin on enter beginning date (“Effective Date”)and continue through enter ending date (“Expiry Date”). This SOW may not be renewed or otherwise amended except through a Change Order pursuant to the Change Management section below.

# Key Tasks and Activities, Deliverables and Completion Timeframe

[UCI DEPT – YOU CAN USE THE TABLE BELOW OR YOU CAN USE THE PARAGRPH STYLE. CHOOSE ONE AND LEAVE THE OTHER BLANK – WE WILL DELETE THE ONE YOU DO NOT USE]

**Key Tasks and Activities:**

Insert specific details using action verbs like “create”, “develop”, “test”, “analyse”, “evaluate”, etc. Identify all phases. If additional phases will not be known until first phase work begins, be sure to specify hourly rate and a not-to-exceed price. Request Supplier to provide data type, protected health information and other data.

**Deliverables**

List each discrete tangible work product that is considered a critical end result from the Supplier; deliverables are nouns.

**Completion Deadlines or Milestones**

Specific dates are best; can be stated as “Week 1”, “Week 2”, etc.

----OR complete the table; you do not need to complete both----

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Supplier Obligations** | | | | |
| **Task** | | **Activities** | **Deliverables** | **Completion Date or Timeframe** |
| 1 | Insert general description of task. | Insert specific details using action verbs like “create”, “develop”, “test”, “analyse”, “evaluate”, etc. Identify all phases. If additional phases will not be known until first phase work begins, be sure to specify hourly rate and a not-to-exceed price. Request Supplier to provide data type, protected health information and other data. | List each discrete tangible work product that is considered a critical end result from the Supplier; deliverables are nouns. | Specific dates are best; can be stated as “Week 1”, “Week 2”, etc. |

**-----To insert additional lines in the table, click on the blue ➕ sign at the end of the line item.-----**

# UC Obligations

Include appropriate language such as “UC will provide…”

# Place(s) of Performance

Check all that apply:

On UCI’s campus or UCI lease space. describe the campus location.

Supplier’s place of business

Other: state the location.

# Key Personnel

Supplier’s Account Manager is listed below, is subject to UC approval, and hasoverall responsibility for managing the UC/Supplier relationship:

|  |  |
| --- | --- |
| **Name & Title** | Enter Supplier Account Manager name and title. |
| **Company** | Enter Supplier Company name. |
| **Phone** | Enter Supplier phone number. |
| **Email** | Enter Supplier email. |
| **Address** | Enter Supplier address. |

UC’S Project Manager, responsible for acceptance/rejection of project results/deliverables, is:

|  |  |
| --- | --- |
| **Name & Title** | Enter UC Project Manager Name and Title. |
| **Department** | Enter UC Department Name. |
| **Phone** | Enter UC phone number. |
| **Email** | Enter UC email address. |
| **Address** | Enter UC address. |

# Report Requirements

Identify any key reports that should be produced by Supplier or any critical reporting events. This can be included in the table above if preferred. If none, enter “N/A”.

Supplier agrees to provide other reports as reasonably requested by UC during the Term of the Agreement and any extension(s) to the Term at no additional cost to UC.

# Pricing

Supplier shall provide all Goods and Services at the following fees/prices:

as fixed price services, inclusive of all fees, costs, or other expenses: State the total fixed price cost/fee for this service $\_\_\_\_\_\_\_\_

OR

as time and materials services at the following rates:

**(if more than one person will render services, click on the “+” icon on the right side of the table.)**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name or Position Title of Persons Rendering Services** | **Rate per Hour/Day** | **Duration** | **Extended Cost of Fees (in USD)** |
| Company representative | Can include time and materials using hourly rate, whether there is a “not to exceed” cap, or a flat fee. | Specify duration (e.g., 120 hours, 3 months, or 1 year). | Specify extended dollar amount |
| Company representative | Can include time and materials using hourly rate, whether there is a “not to exceed” cap, or a flat fee. | Specify duration (e.g., 120 hours, 3 months, or 1 year). | Specify extended dollar amount |
| Maximum Expenses (if any):  Description of Expenses: Click or tap here to enter text.  **All travel expenses must be incurred consistent with** [**UC Travel Policy G-28.**](https://policy.ucop.edu/doc/3420365/BFB-G-28)**and** [**UC Irvine policy Sec. 715-01.**](https://www.policies.uci.edu/policies/pols/715-01.php) | | | Enter expense total. |
| **Maximum Authorized Total:** | | | **Specify max cost** |

Payment Schedule:

OPTIONAL: If payments will be made at set intervals, or upon completion of certain milestones, describe the timing and percentage of those payments. Note that UCI should not make advance payment before work is complete. Enter N/A if payments will simply be made upon receipt of an invoice.

# Changes to the Services

UC may desire to change the Goods and/or Services following execution of an SOW. If so, UC will submit a written Amendment to Supplier describing the changes in appropriate detail. If an Amendment does not require Supplier to incur any additional material costs or expenses, then Supplier will make the modification within ten (10) business days of Supplier’s receipt of UC’s Amendment. If an Amendment does require that Supplier incur additional material costs or expenses, then Supplier in good faith will provide UC with a written, high level, non-binding assessment of the costs and expenses and the time required to perform the modifications required by the Amendment, within ten (10) business days of Supplier’s receipt of UC’s Amendment. UC will notify Supplier in writing within ten (10) business days after receipt of Supplier’s response to the Amendment as to whether UC wishes Supplier to implement the Amendment based on the response. UC will compensate Supplier for implementation of an Amendment in accordance with the terms and conditions of the relevant Amendment and Supplier’s response to the Amendment, if any. Supplier’s implementation of an Amendment will not delay the performance of Services and/or the delivery of deliverables not reasonably affected by an Amendment.

# No Mandatory Use

Because there is no mandatory use policy at UC, nothing in this Statement of Work will be construed to prevent UC from entering into similar agreements with any third parties including, without limitation, suppliers that may be in competition with Supplier.

# [END OF STATEMENT OF WORK]