Developing an Effective ‘Scope of Work’ for Operations and Maintenance Contracts

All of us in the maintenance business must also be prepared to wear the hat of being a project/contract manager from time to time. Some of you may perform the function every day and continue to stay focused on the day-to-day role of a maintenance manager.

Even though it may not be part of your detailed job description, all maintenance managers are exposed to project and contract management. If this function is done properly it can severely affect the maintenance side of your responsibilities. What I mean by that is if your contract scope and statement of work is not properly developed then the outcome of the contract will more than likely be completed in a sub-standard fashion. This means you and your maintenance team may need to finish or redo work the contractors failed to complete properly. Having an accurate and detailed Scope of Work will improve your chances of having a successful outcome to your projects, contracts, and purchase orders.

Here are some tips and steps I use in developing the ‘perfect’ scope of work. One thing to clarify before getting into the details is: *If you don’t have the skills or feel you have the skills to develop the scope of work because it is beyond you expertise or training* - Find someone to assist you in the building of the scope. You can still manage and write a great scope even if you don’t have the technical skill to do it yourself. I have used other managers, technicians, contractors, vendors; and in large and very complex projects, engineering design firms.

- **Understand what the final objective is for the project.** Ask yourself or the final customer what defines success for this particular contract.
- **Question to the void.** In other words question, until there are no more possible questions to ask.
- **Copy similar scopes of work from similar contracts which were a success.** Reinventing the wheel just wastes time.
- **Publish your final understanding and have customers approve, if appropriate.** The more people that agree with your logic and approach the better.
- **Have a complete understanding and approval of where the capital or expense funds are coming from.**
  - This is critical because any project or contract which begins to run short on funding will start affecting the scope of work.
Those of you who have had some project management training are familiar with the project management triangle. If you change any of the legs of the triangle like the funding then the other legs of the triangle must be changed as well.

- **Have a complete and approved time schedule.** As I said above, if you change the time of the contract it will more than likely change the scope of work.

- **Break the scope of work into simple and manageable pieces.** This will help prevent missing key components of the job.
  - **Site preparation** – what has to be moved, relocated, stored or covered before the work begins
  - **Define what is involved** - the demolition part of the work. This includes anything which has to be removed or demolished before the new work begins or equipment is installed
  - **Define what is involved** - in the new construction or installation of equipment or systems
  - **Define the final finish work** - which includes the little things like: clean-up, disposal of scrap, painting, labeling, insulating of pipes and walls, etc.
  - **Acquire all documentation** - from vendors and contractors like: as built drawings, owner’s manuals, start-up documentation, etc.

- **Have some sort of final inspection and quality control process which is documented and recorded.**

In my 40 year career, I spent a quarter of that time as a project manager for large projects and appropriations in and above the million dollar range. The other 3 quarters I spend handling maintenance related projects and contracts from $2 dollars and up. Every time I had a failed project or contract, the root cause most often was an incomplete scope of work. This allowed the contractor/vendor to do what they thought was best or cheapest instead of what we really wanted to assist us with our business. The scope of work can never be too good or too detailed. More is always better.

Keep in mind... the more time and detail spent preparing the scope of work then the more successful the final product will be.