Welcome

Scope of Work (SoW)
Best Practice Development
Sub-committee Workshop
Scope of Work Development - Standardize and Structure For Success

Best Practices XXIV Workshop
Wednesday May 11, 2016
Introductions - Our Team

- Sandra McEwen, Chemco (Chair)
- Leanna Olson, Miller Thomson LLP
- Corey Sandquist, Sandquist Law
- John Lacroix, Toyo Engineering
Agenda

- Introduction/ Overview
- General Issues
- Draft Documents
- Feedback, discussion and Q&A
• Subcommittee of the COAA Contracts Committee
• Mandate: Enhance productivity through clear scopes of work
  - Support “Twice as Safe, Twice as Productive by 2020” through a comprehensive scope of work framework
  - Goal is to be clear, concise and easy to read
  - Avoid people guessing at any stage
  - Alleviate wasted time and resources from mismatched assumptions about contract scope requirements
General Issues

• Contract must be reviewed as a whole
  - Consistency between SoW, GCs, Special Conditions and Payment Terms
  - One subject in one contract section, avoid duplication
  - GCs should not be in SoW

• Panel Perspectives
  - Contract Review/Litigation
  - EPC
  - Contractor
Common Disconnects

- Site access
- Supply of consumables
- Site materials management
  - Deliveries, lay down areas
- Deliverables expectations
- Interfaces
- Roles and responsibilities between parties
- Turn over requirements

Requires a flexible, comprehensive template that drives conscious choices
• Preamble: Describes template and intent
• Template: Model for drafting Scopes of Work
• Standard SoW attachment formats:
  - Division of Responsibilities Matrix
  - Project Deliverables Matrix
  - Interface Types
  - Shared Services Matrix
• Key Considerations / Tips overview
1. Overview of the Project
2. Scope of Work Overview
3. Scope of Work Breakdown
   3.1 Design and Engineering
   3.2 Project Management
   3.3 Procurement
   3.4 Subcontracting
   3.5 Construction
   3.6 Party Responsibilities
   3.7 Site Services
   3.8 Battery Limits
   3.9 Commissioning and Start-Up
SoW Template Contents

4. Schedule and Milestones
5. Deliverables
6. Interfaces
7. Environmental, Health and Safety
8. Quality
9. Attachments
Discussion and Feedback

• Other Scope of Work issues?
  - How are they being addressed?

• Any thoughts on the SoW template presented?

• Feedback from testing any of the package elements is welcome
Wrap-up

- Workshop feedback form
- Anyone interested in joining the efforts, please come see one of the committee members!
- Leave your business card if you anticipate using the package on a trial basis.
Comments

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