



# Welcome

The background of the slide is a faded, high-angle photograph of a construction site at dusk or dawn. The sky is a pale yellow-orange. In the foreground, several construction workers are silhouetted against the light, working on a concrete slab. A large tower crane is visible in the middle ground, and the skeletal structure of a building under construction is visible in the background.

## **Scope of Work (SoW) Best Practice Development Sub-committee Workshop**



# **Scope of Work Development - Standardize and Structure For Success**

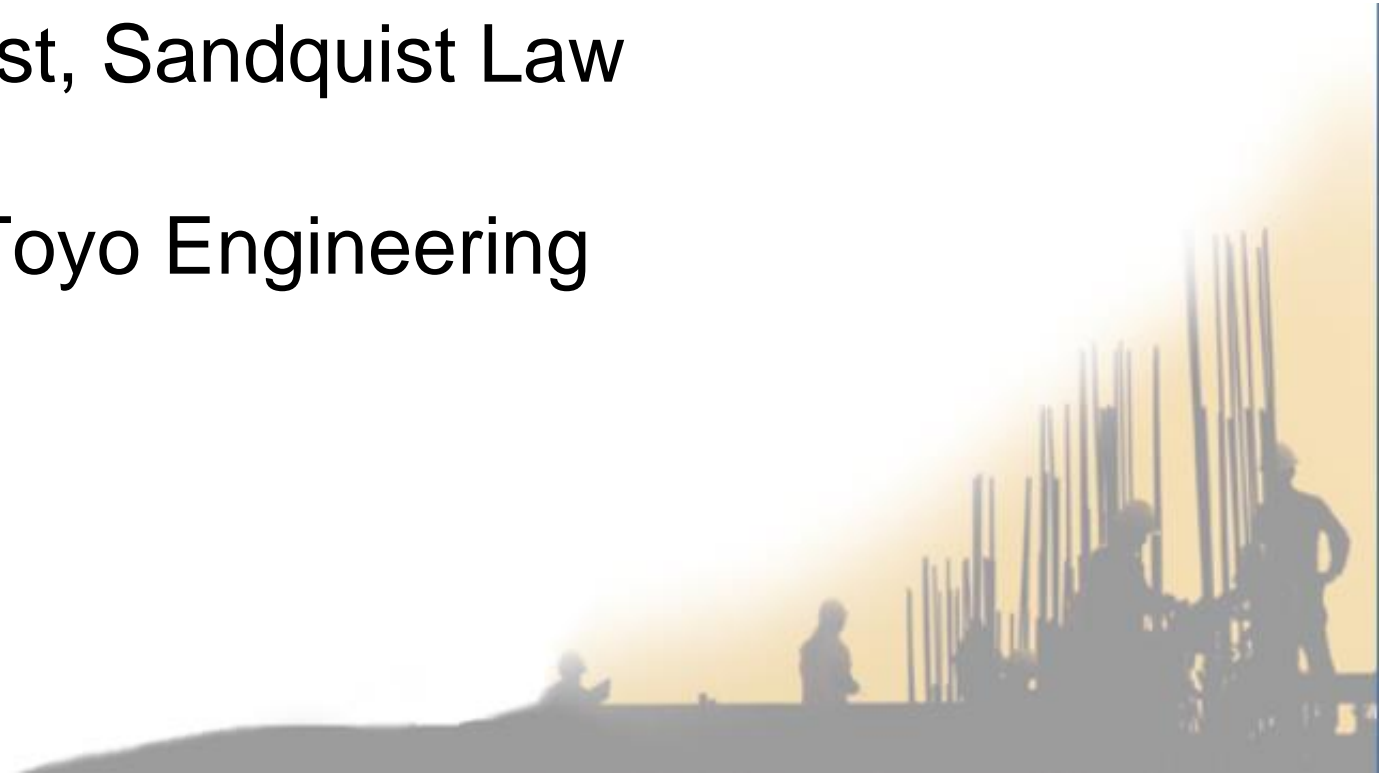
**Best Practices XXIV Workshop  
Wednesday May 11, 2016**





# 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





# Safety Topic



# Introduction/Overview

- 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

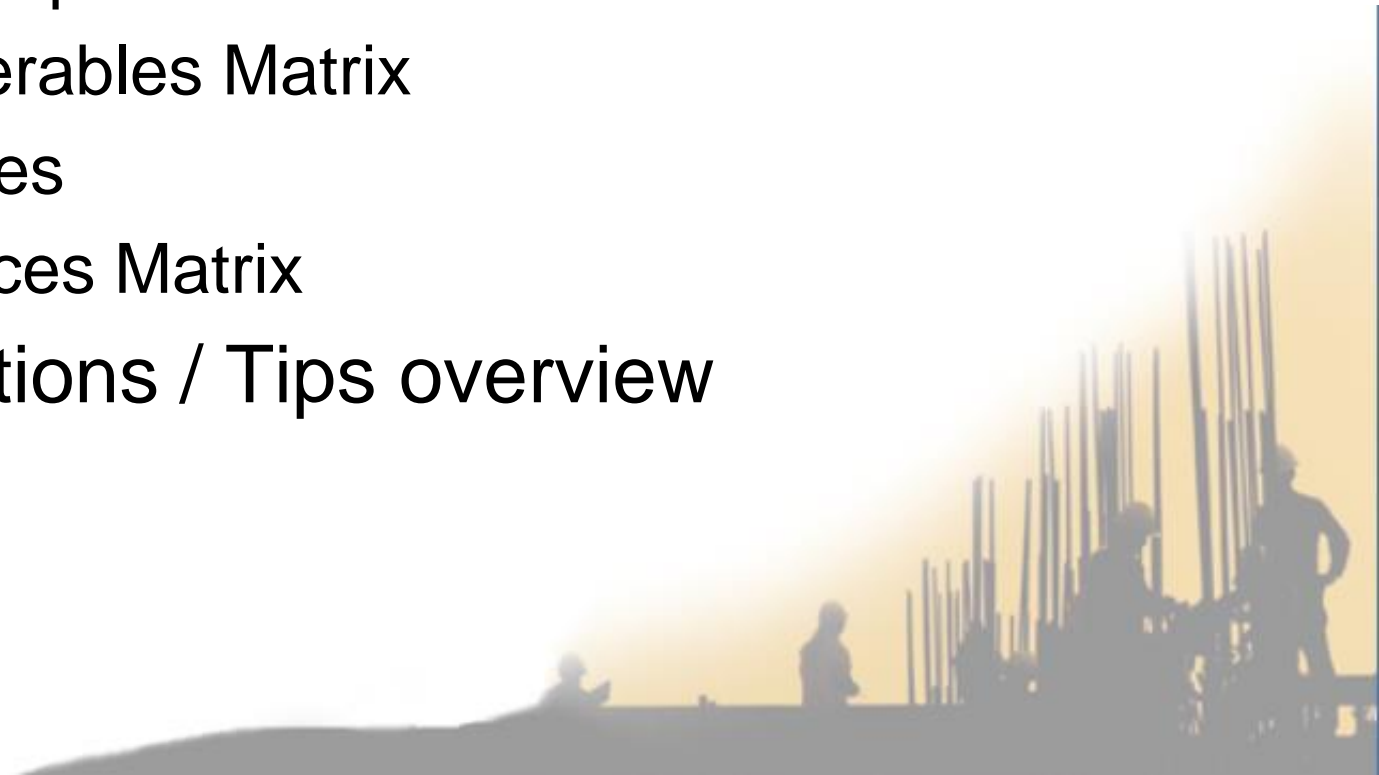
- Site access
- Supply of consumables
- Site materials management
  - Deliveries, lay down areas
- Deliverables expectations
- Interfaces
- Roles and responsibilities between parties
- Turn over requirements

Requires a flexible, comprehensive template that drives conscious choices



# Draft Best Practice Package

- 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



# SoW Template Contents

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

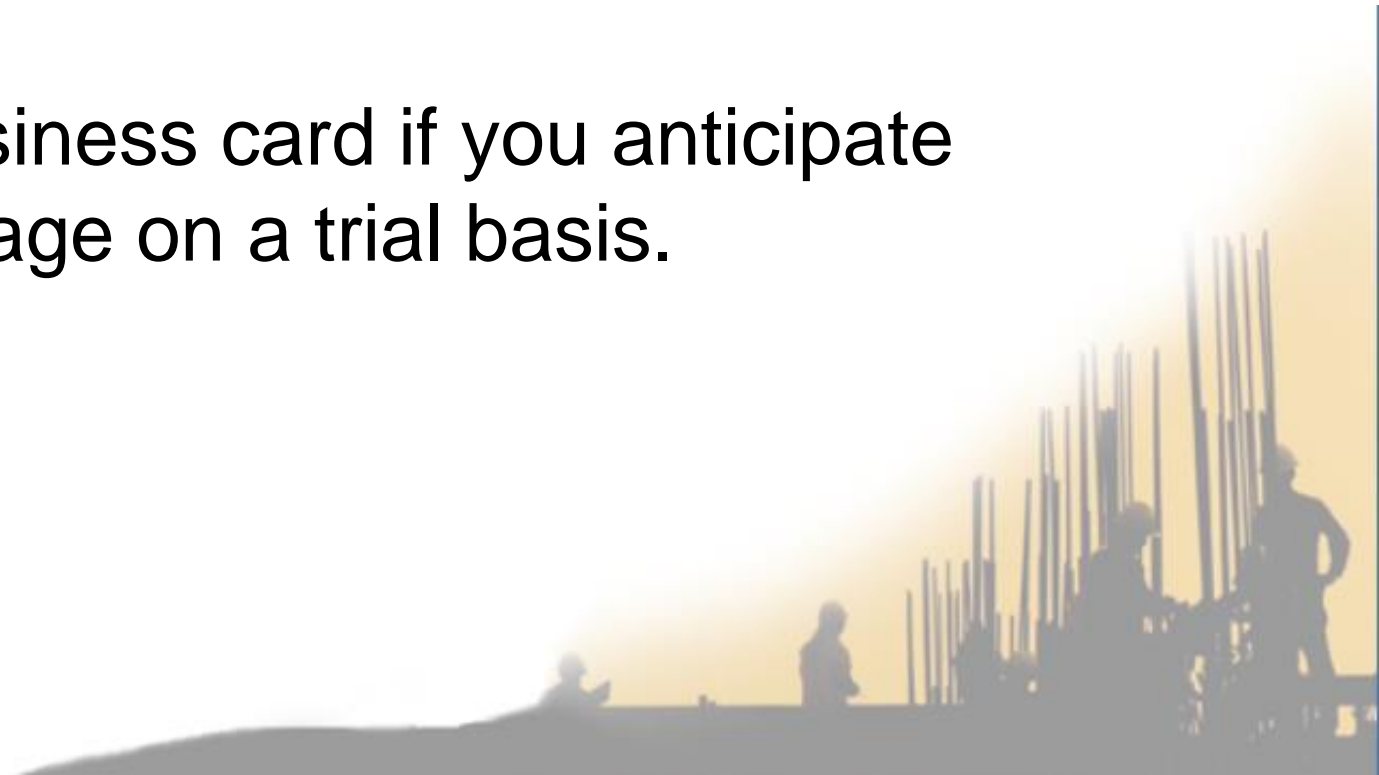
- Other Scope of Work issues?
  - How are they being addressed?
- Any thoughts on the SoW template presented?
- Feedback from testing any of the package elements is welcome



## 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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