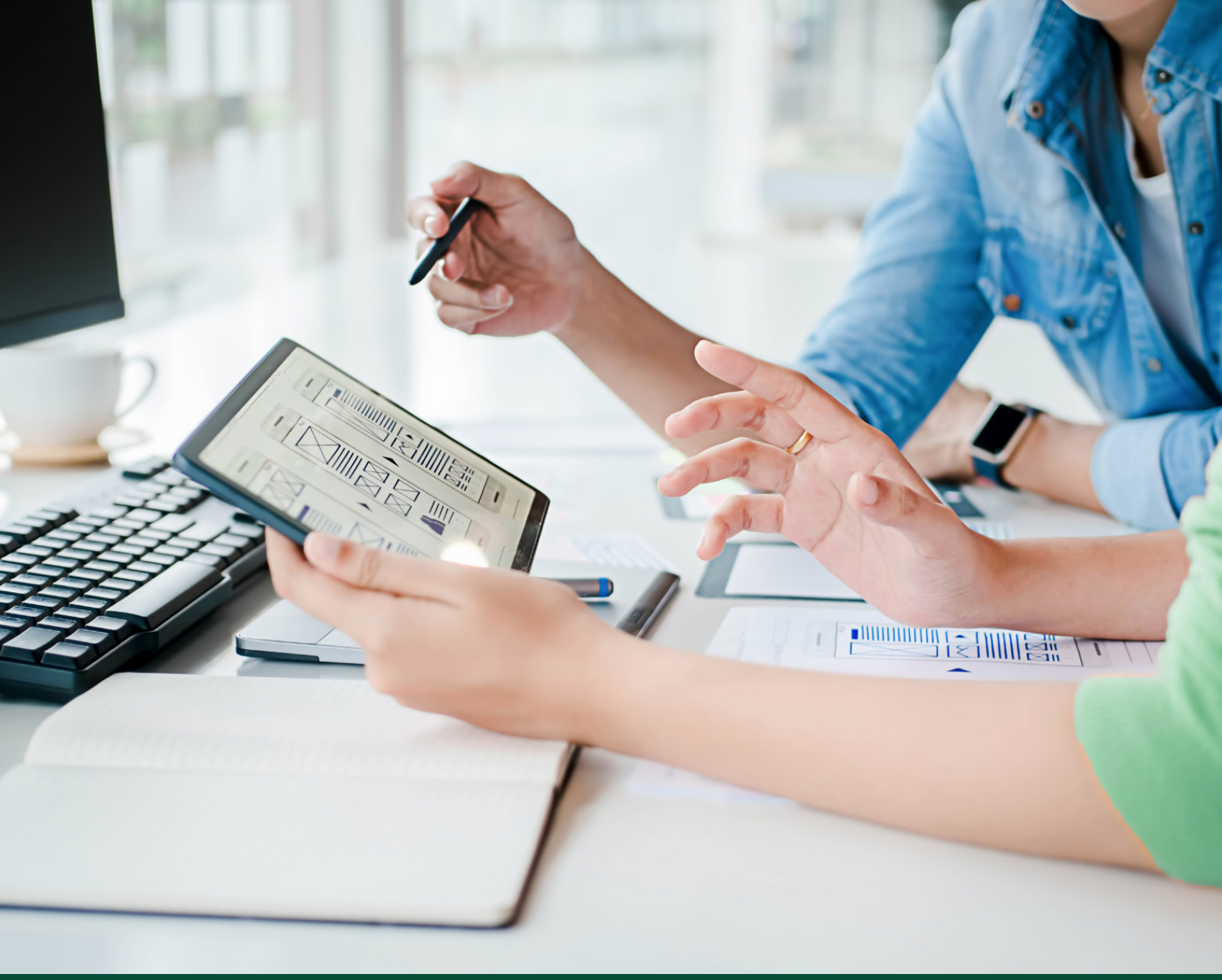

Scope of Work Guidebook

Procurement
MICHIGAN STATE UNIVERSITY

Procurement-GUIDE02v01 | Release Date: 09/26/25 | This document is uncontrolled when printed or saved.

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Getting Started

What is a scope of work?

The scope of work is a document created by subject matter experts from the requesting department. In addition to providing background on what your department or project aims to achieve, this document informs potential suppliers of your requirements, timeline, goals, and expectations.

While the Scope of Work is most commonly used in an RFx process, it can be helpful for any purchase as it provides more information to suppliers, ensuring you get exactly what you need, when you need it.

Introduction to the RFx process

As part of the purchase order process, your MSU Procurement buyer will determine if an RFx event—also known as a bid opportunity or sourcing event—is necessary to achieve the best value for the university. Suppliers will be invited to provide information, quotes, or proposals based on the Scope of Work you provide.

The RFx event may consist of several stages, including public posting, Q&A, demonstrations, evaluation of bids, negotiation, and contract award. Learn more about the RFx process in the Procurement Guidebook.

Where is an RFx event within the procurement process?

Creating your Scope of Work

Checklist

This checklist outlines the necessary components for the Scope of Work section of the RFP to be created in a separate document by the requesting unit. The resulting Scope of Work will be part of a larger package of documents shared with potential suppliers by MSU Procurement.

Do not share the Scope of Work document with any supplier or involve any suppliers in its creation. Potential suppliers should also not create the Scope of Work.

- ☐ **Background**
  - ○ Title of project
  - ○ Purpose of the project and, if applicable, secondary objectives
- ☐ **Overview**
  - ○ **Scope:** Identify and explain the service/product/solution that is requested
  - ○ **Intent:** State the use of the service and the MSU unit(s) that will utilize it
- ☐ **Timeline**
  - ○ Identify the specific delivery dates for all the services the supplier must furnish, including start and/or end dates or duration for the project
  - ○ Be clear about your expectations for the supplier's performance
- ☐ **Definitions and applicable documents** (optional)
  - ○ Define technical and critical terms
  - ○ List all documents referred to in the scope of work including:
    - Title
    - Edition or issue number
    - Year of publication
    - Publisher of originating organization
    - Location of the documents if unclear

Checklist (continued)

- ☐ **Requirements**
  - ○ **Mandatory minimum requirements:** the requirements that must be met by a supplier for a supplier's proposal to be accepted and proceed to evaluation phase
    - Work with your MSU Procurement buyer to determine what mandatory minimum requirements are necessary
    - Use "must" for these requirements
    - May be subject to changes in grant status or funding
  - ○ **Performance/technical requirements:** specific tasks, sub-tasks, parameters, and limitations, which may be considered in producing the service or final project
    - Details of work environment, location of service
    - Desired qualifications
    - Definition of service unit
    - Travel regulations and restrictions
    - Special equipment required
    - Implementation and training
    - Warranties and maintenance
  - ○ **Expected deliverables:** what is the final product you are looking for
  - ○ Special Pricing Structures (optional)
    - Cost share
    - Fixed rate vs. variable

Overview

While goods are often physical (e.g., a microscope), they can also include virtual items such as software licenses. A scope of work helps suppliers understand the intended use of the item to be purchased, ensuring the good(s) provided meet your department's needs.

Scope of work sample for equipment

Background

The Legume Research Laboratory (LRL) Improvements Project will research variables related to boiled peanut production and quality. The project will also review code requirements as appropriate. The LRL was established in 2002 to support research and outreach of legumes and legume products around the world. LRL projects provide output to farmers and producers to improve crop yields, promote growing programs, and develop efficient processing techniques to improve producer return on investment.

Scope of Work

Overview

To support the new research line, LRL is seeking to purchase an industrial grade kettle that will allow for both soaking and boiling of peanuts according to FDA food safety guidelines. The industrial grade kettle selected will be used for multiple batches on a weekly basis. Researchers will use time and temperature adjustments to test the impact of these variables on the quality of the finished product.

Requirements

Mandatory Minimum Requirements

1. The kettle must meet all Food and Drug Administration (FDA) food safety standards.
2. The equipment must allow for temperature and time adjustments.

Technical Requirements

1. The equipment must allow for temperature and time adjustments. The supplier should provide a fully functional solution that will allow for soaking and boiling batches of peanuts. Provide a complete description of the solution including any additional relevant information (i.e., does this equipment come with software, etc.). Describe the attributes of your solution.
2. Provide a schematic of the equipment showing the locations of controls, equipment monitoring features, the alignment of the machine, and the overall layout. Include the overall dimensions of the equipment and any special handling or receiving guidance.
3. The solution and computer applications should be operable with a standard PC. Identify all

solution (hardware) requirements for the proposed solution and computer applications that are required for a fully functional solution.

4. The solution must be ergonomically engineered for maximum productivity. Describe how the solution meets this requirement. Identify whether additional components such as seating, cushioned mats, etc., are required or recommended.
5. The solution should allow varying levels of access to the system by role assignment to end users. Describe the roles available for both end users and administration/backend users, as well as any quantity limitations on roles or seats. The system should support the University's Multi Factor and Login system (Okta) and have the ability to map MSU groups to different roles.

Installation, Implementation, and Training

1. The supplier should aid LRL to install the industrial kettle. Provide a description of the services your company has available for equipment design, drawings, and installation/ usage (use applicable descriptions).
2. The supplier should provide a complete listing of the necessary components that will be provided under your proposal. Additionally, if applicable, the supplier should provide installation of all components of the hardware and software necessary to provide fully functional equipment.
3. The supplier should provide testing of the equipment following installation/delivery as part of the implementation process. Provide a description of the testing that your company typically performs to ensure that the equipment is properly working. If elements of the equipment are not properly functioning currently, identify how your company addresses this.
4. The supplier should provide training for LRL employees in the proper use and function of the equipment. Provide a complete description of your training program.
5. The supplier should provide a minimum one (1) year warranty for all parts and labor on the equipment, following acceptance by LRL. Identify your standard warranty period for the equipment.
6. The supplier should complete installation/delivery of the system/equipment (whichever is applicable) approximately (determined amount of time) from issuance of a purchase order. The system should be fully operational prior to (determined date) but must be operational prior to (determined date) Provide a typical timeline from receipt of order through installation and training. As part of your response, identify milestones and those issues that have typically caused a project to take longer to complete. Describe the programs your company has in place to ensure that delivery and installation timelines are met. Included in your description, the customer incentives you provide, if your company exceeds the agreed timeline (price reductions for delays in project completion, provisions for additional product or services on a no charge basis, etc.).

Maintenance

1. The supplier should provide information regarding options for post-installation/delivery maintenance and support for all portions of the equipment. Identify all levels of maintenance support that are available and what is included in each level of support.
2. The supplier should provide a list of recommended spare parts that you believe each customer should keep on hand in the event of an issue. Provide this spare parts listing as a part of your proposal along with cost information for each recommended part.
3. The supplier should provide a schedule of preventative maintenance that is to be performed on the equipment.
4. The supplier should provide advance notice for changes to terms of service and communicate any required off-cycle maintenance or software advisories (if applicable).
5. The supplier should provide a description of the problem resolution process that is routinely performed when problems are reported by customers. This process should include an escalation process with key individuals for contact identified.
6. The supplier should identify all the requirements the equipment has for energy utilization. If the equipment is considered to be eco-friendly, identify characteristics that qualify the equipment to be categorized in this way. If the equipment is certified as eco-friendly or green, provide documentation to support this including identification of the certifying organization(s).
7. Hardware and software maintenance services should be included in the purchase and/or the term of the lease.

Scope of work sample for vehicle

Background

This project will research environmental impacts on the germination and growth rate of black-eyed peas. The LRL was established in 2002 to support research and outreach of legumes and legume products around the world. LRL projects provide output to farmers and producers to improve crop yields, promote growing programs, and develop efficient processing techniques to improve producer return on investment.

This vehicle will be used to transport LRL staff members to and from research plots around the state of Michigan. The vehicle must be able to handle conventional roads, dirt roads, and rough terrain.

Scope of Work

Overview

Michigan State University (the "University" or "MSU") is soliciting proposals through this Request for Quote ("RFQ") for the purpose of purchasing a vehicle; a 4x4 Double Cab Pick Up or a 4x4 SUV. Respondents are requested to provide quotations for the mentioned items below that at a minimum contain the following specifications listed.

Technical specifications for 4x4 Double Cab Pick-Up

1.0	***Mechanical & Transmission***
	Type: Pick-up – diesel
	4x4 Regular Double Cabin pick up
	Drive type: 4x4 manual transmission
2.0	***Technical Specifications***
	Displacement: approximately 2,800 - 3,500 cc
	Fuel tank capacity: 18 - 24 gallons
	Suspension: FR-Double Wishbone Independent with Coil Spring; RR Rigid axle, Leaf Spring
3.0	***Tires and Wheels***
	Tires: all terrain; 265/60R18 Alloy Wheels; spare wheel 265/60 R18
4.0	***Security/Safety***
	Crash Resistant Body Structure, Energy Absorbing Bumpers, Collapsible Steering Column, Door Lock and Power Door Lock, SRS Air Bags for driver and passenger, Factory
5.0	***Interior***
	Fabric or leather seats; Air conditioner and heater non-cfc; front and back defrost/defogger; power windows; radio with FM and AM, Bluetooth, AUX and USB, MP3/4 functionality; power mirrors
6.0	***Exterior***
	Laminated Rear Bumper; Steel Flat Paint Front Bumper; Molding Mud Guards; Front, Rear, door Side Steps; Radiator Grille; Door Handles – Outside; Outside Rear-View Mirror, LED/Halogen Headlamps, LED Front Fog Lamp, Spare Wheel, Towing Ball and Pin
7.0	***Other***
	Steering: adjustable steering standard
	Color: Any
	Warranty Requirement: 3 Years or 100,000 Miles whichever comes first.

1. **Pre-Delivery Checklist:** Pre-Delivery Checklist will be completed and delivered with the Vehicle

Scope of work sample for Information technology (IT)

Background

The Legume Research Laboratory (LRL) was established in 2002 to support research and outreach of legumes and legume products around the world. LRL projects provide output to farmers and producers to improve crop yields, promote growing programs, and develop efficient processing techniques to improve producer return on investment.

The purchase of a field crop management system is aimed at providing LRL with an innovative and efficient way to manage their data variables across multiple research locations. The system will offer real-time data inputs and tracking, detailed reporting, and predictive analytics to optimize crop yields.

Scope of Work

Features

- User authentication and authorization system using MSU Okta/Single-Sign-On.
- Real-time tracking across all research locations.
- Comprehensive reporting dashboard with export capabilities.
- Predictive analytics for crop yield forecasting.
- Mobile application for on-the-go field data management.

Technical Requirements

- Compatibility with both Windows and macOS for the desktop and mobile application.
- Responsive web design for the management dashboard.
- Cloud-based database solution for centralized data storage and retrieval.
- Implementation of industry-standard security protocols for data protection.
- Cache database locally in case connectivity is lost.
- Provide a description of how your company addresses bug fixes.
- Must be compatible with existing software (unit to list the software compatibility)

Milestones & Deliverables

- Project Initiation and Requirements Gathering.
- System Design and Architecture Planning.
- Development Phase 1: User Authentication and Field Data Tracking.

- Development Phase 2: Reporting Dashboard and Predictive Analytics.
- Development Phase 3: Mobile Application.
- System Testing and Bug Fixing.
- User Acceptance Testing (UAT) and Final Adjustments.
- Deployment and Go-Live.
- Post-Deployment Support and System Training.

Acceptance Criteria

- All features function as described in the scope and have passed QA testing.
- No critical bugs are present in the system at the time of deployment.
- The client has conducted UAT and provided written approval of the system's functionality.

Procuring a service

Overview

Services can vary widely, from one-time event planning to a multi-year maintenance agreement. A scope of work ensures potential suppliers understand the nuances of what services need to be rendered and when, as well as performance expectations.

Scope of work sample for consulting

Background

The Legume Research Laboratory (LRL) was established in 2002 to support research and outreach of legumes and legume products around the world. LRL projects provide output to farmers and producers to improve crop yields, promote growing programs, and develop efficient processing techniques to improve producer return on investment.

LRL research is disseminated to various stakeholders, including farmers, legume processors, researchers at other schools, and university leadership. Communication channels and audience needs are changing rapidly, and LRL is seeking to grow and refine how they reach their target audiences.

Scope of Work

Goals

LRL is looking for a marketing consultant to research their audiences and provide recommendations for future communications. Communications can include printed materials, social media platforms, newsletters, presentations, website design, and other methods. The consulting engagement must include:

- Assessment of stakeholders, including demographics, preferred communication channels and methods
- Report on the current state of industry methods of communication and marketing
- Recommendations report and presentation detailing the most impactful ways to communicate and market our research

Required Consultant Experience and Skills

- Previous experience with large R-1 universities
- Previous experience in higher education, science, or technology communication

General Conditions

- Performance of work per the agreement resulting from this RFP shall be coordinated with the Legume Research Laboratory
- The selected consultant for this engagement will be subject to the University's Criminal

Background Check Policy, available at: https://upl.msu.edu/common/documents/criminal-back-ground-check.pdf.

- If the University, at its sole discretion, determines the selected supplier is subject to this Policy, the supplier must sign and deliver the Contractor Certification for Criminal Background Checks to University prior to the provision of any services or delivery of any goods.
- If travel reimbursement is allowed by the resulting agreement, reimbursement is subject to MSU's Travel Reimbursement Policy set forth at https://travel.msu.edu/reimbursement.

Milestones & Deliverables

Start of engagement	8/18/2025
Consultant on-site/off-site	8/18/2025-2/18/2026
Assessment planning completed	9/20/2025
Stakeholder assessment completed	12/20/2025
Detailed findings report completed	1/6/2026
Current state, industry trend, and analysis completed	1/20/2026
Draft of recommendations and report provided for workgroup review	2/1/2026
Final recommendation presentation to LRL leadership & advisory board	2/18/2026

Scope of work sample for intra-campus equipment moving

Background

The Legume Research Laboratory (LRL) was established in 2002 to support research and outreach of legumes and legume products around the world. LRL projects provide output to farmers and producers to improve crop yields, promote growing programs, and develop efficient processing techniques to improve producer return on investment.

The LRL is upgrading HVAC and electrical connections in their laboratory space and will be unable to access the space during the upgrade. All equipment will need to be removed from the lab to facilitate contractor access until the renovations are complete.

Scope of Work

Overview:

In alignment with the Legume Research Laboratory (LRL)Infrastructure Improvements Project, the LRL will need to move its experimental equipment out of the existing laboratory space.

Deliverables:

The equipment will need to:

- Be safely packed, inventoried, and labeled.
- Be transported to a storage facility provided by the Supplier that follows collections stewardship standards including climate control, protection from agents of deterioration, and security.
- Be transported back to the LRL space following completion of the construction project.
- Be unpacked in the laboratory, working with LRL staff to rebuild the equipment.

The equipment consists of approximately 12 pieces of machinery placed on the 2nd and 3rd floors of the lab's building. There are heavy / bulky items that may require handling by more than 1 person and special equipment, (e.g., a large scanning microscope, an industrial grade kettle).

Timeline:

All items must be packed and moved out of the LRL by July 31st, 2024.

Rehousing of items in the laboratory will start tentatively in April 2025. The rehousing start date is dependent on the construction timeline and subject to change.

Requirements

Mandatory Minimum Requirements:

- The respondent must provide a Climate Controlled Warehouse with security, pest control and adherence to general collections stewardship.
- The respondent must comply with the Timeline provided in the Scope of Work.
- The warehouse location must be in the US.

Additional Requirements

- All necessary personnel, equipment and materials required for the services will be provided by the supplier.
- The supplier will be responsible for the adequate recycling/disposal of waste produced during the services. Insurance limits mentioned in the Master Service Agreement will be adjusted per the proposed warehouse.

References

Glossary

- **Buyer: MSU** Procurement staff members who evaluate purchase requisitions, solicit quotes and proposals, negotiate pricing and terms, and oversee the issuance of purchase orders (POs)
- **RFx event:** General term for the three categories of bid opportunities: Requests for Information (RFI), Requests for Quotations (RFQ), and Requests for Proposals (RFP)
- **Supplier:** A company who provides goods or services to the university
- **Unit:** Organizational entities at the university, each with a responsible administrator; includes departments, organizations, programs, colleges, and Major Administrative Units (MAUs)

Additional resources

- Procurement Guidebook
- Manual of Business Procedures (MBP) Section 270