

# Developing an Effective Scope of Work for Operations & Service Contracts

**Jake Smithwick, PhD, FMP, SFP**

**University of North Carolina at Charlotte**



# Outline

- Challenges in Preparing a Scope of Work
- The “Silver Bullet” of Scope Development
- Operationally-Focused Procurement Tools
- Becoming a Client of Choice

# Simplar Research Institute

- **Become a Client of Choice**
  - Attract high performing teams
  - Identify & leverage expertise
- **Become a AEC or Vendor of Choice**
  - Use performance information to improve hit rate
  - Work like an expert for higher profit
- Benchmarking, exploratory talent development
- Hands-on Project Integration



**20+ Years | 210+ Publications | 100+ Partners**  
**2,500+ Projects | \$11+ Billion Procured**

## Information Technology

Networking  
Data centers  
Hardware  
COTS software  
ERP systems

Help desk services  
eProcurement

## Facility Management

maintenance  
landscaping  
security service  
building systems  
industrial moving  
waste management  
energy management

custodial  
conveyance  
pest control

## Health Insurance/ Medical Services

## Manufacturing

## Business / Municipal / University Services

Dining Services  
Multi-media rights  
Fitness equipment  
Online education  
Document management  
Property management  
Communications systems

Recycling  
Bookstores  
Laundry  
Audio Visual  
Retirement Funds

## Construction / Design / Engineering

Infrastructure	Renovation	DBB
Municipal	Repair	CMAR
Laboratory	Maintenance	DB
Education	Roofing	IDIQ
Hospital	Demolition	JOC
Financial	Development	Low Bid
Specialty	Supply chain	IPD



# Other Current Partners



# Current Utility Efforts

- \$1.5B Mainline / Trunkline (100+ projects, 6-10 years)
- \$400M+ Groundwater Treatment
- \$100M ERP IT
- \$30M Smart Grid Consultants
- \$30M Smart Grid Change Management
- \$900M Smart Grid/Meter Replacement (1.5M Electric/700 Water)
- \$100M Office Building
- \$3.1M Design + \$60M Turbine Replacement
- \$400K Design + \$2.5M Solar Microgrid
- \$15M GIS IT
- \$4.5M Asset Management System for Electrical Assets, Demand-Side Management, and an Analytics System & Database
- \$3M Substation (x2)
- CM Program/VOR Program
- COR Program/Audit (\$1.2M), Accounting, Other various consultants

# A Traditional Approach To Hiring An Expert



**OBJECTIVE:** Hire a brain surgeon to perform surgery on a loved one

## TRADITIONAL APPROACH:

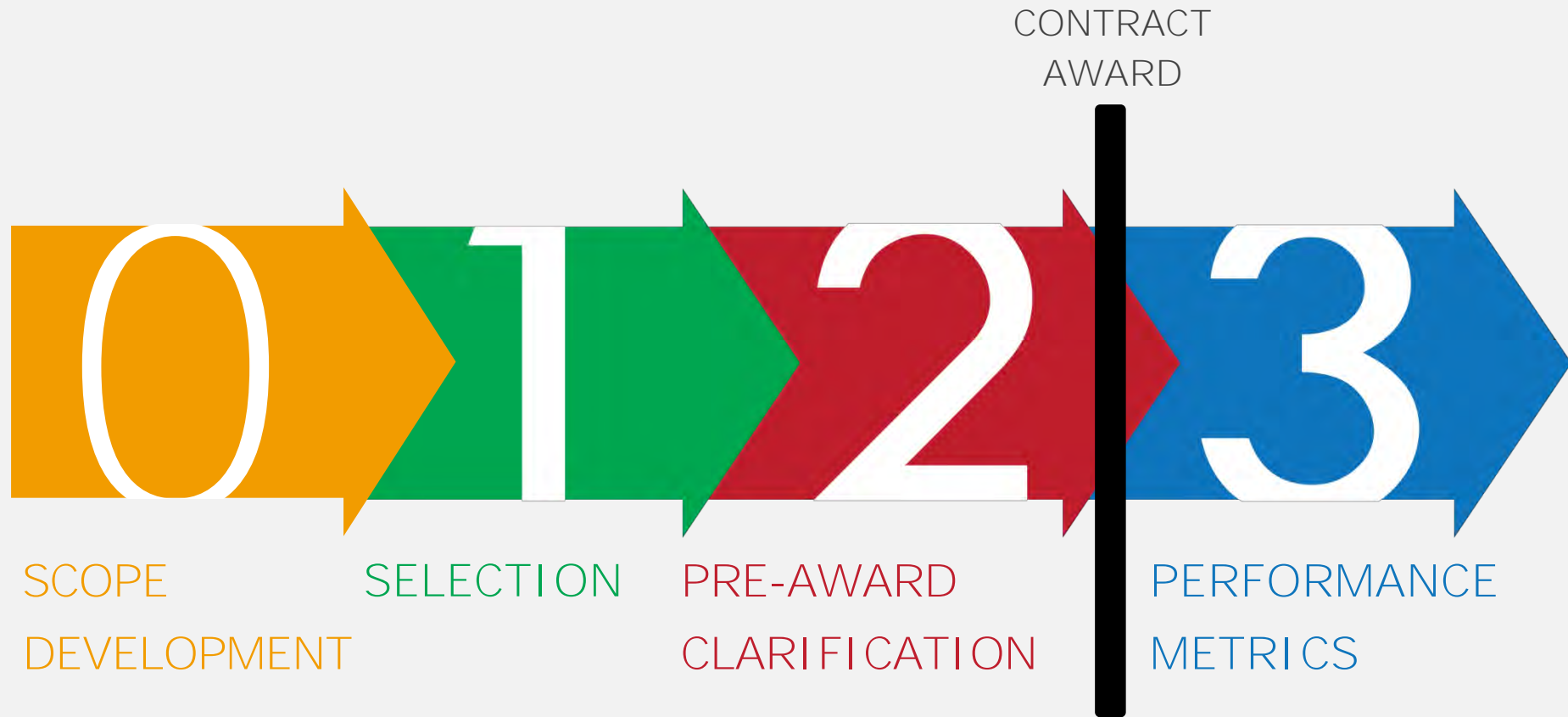
- **First Step** = Provide an unclear explanation of the symptoms & objectives
- **Second Step** = Hire the cheapest (or favorite) surgeon
- **Third Step** = “Negotiate” their proposal:
  - Ask that surgeon to find ways to lower their price some more?
  - Request that the surgeon completes the surgery faster?
  - Request that they follow your instructions on performing surgery?
  - Identify what tools they are allowed to use?
  - Direct them on which nurses/doctors they can use?
  - Hire other individuals to tell the surgeon how to do the surgery?
- **Fourth Step** = Act completely surprised when the surgery is not successful!

# Our Research Mission

1. **Minimize Cost by becoming more Efficient**
  - Attract and Hire Experts (*operations focus*)
  - Leverage expertise into the contract
  - Measure for positive accountability
2. **Become a Client of Choice**
3. **Facilitate Organizational Mastery**



# Expertise-Driven Project Delivery (XPD)



# Preparing the Scope

- **Can be very challenging**
  - What to put in?
  - What to leave out?
  - How much detail?
  - What details?
  - Don't know what you don't know...?
- Users have a hard time preparing the scope
  - Too busy
  - Too detailed
  - Too technical
  - Too prescriptive
  - Don't know where to start



# Scope of Work / Spec / Reqs

## *Perceptions of Owner SOWs*

- **Unclear**
- Information is missing
- **Overly prescriptive**
- Unrealistic
- **Discourages innovation**
- The owner is “fishing”
- **Misunderstands Needs**
- *Procurement is not fair*



## *Impact*

- **Fewer proposals**
- Low quality proposals
- **Less qualified team/indivs.**
- Less competitive pricing
- **Less consistent pricing**
- Open to interpretation
- **Have to believe the vendor**
- Brings risk to the Owners

# Scope Examples

# Major Utility Group

- Full Technical Specification: **“Pls dig a hol”**





# What's the Budget?

- Procure a high performing A/E to design a high-end IT lab
- Budget: **n/a (Owner did not trust vendors to act in best interest)**
- 4 firms attended the site walk, and **2** submitted proposals
- Both firms describe a facility that will be way over budget
- User selects one firm, and has them design project. Still does not trust the vendor, gives \$1M-\$5M range but not the budget
- Vendor designs project at \$4.5M.
- Client then tells the designer their budget is \$1.5M

# Impact of Open-Ended / Unclear Specs on Vendor Proposals

- Have to believe the vendor
- Open to interpretation
- Encourages the minimum
- Less consistency in pricing (*wide range*)
- Less competitive pricing (*increased contingency*)
- Discourages Vendors from submitting
- **Brings you Risk!**

# University Waste Hauling SOW

5,000+ tons of waste collection  
across an urban university campus



- “An adequate fleet of collection vehicles should be used and maintained by the Proponent... It is the [Owner’s] expectation that collection vehicles designated for service should at a minimum...**be less than two years old at the start of the contract**”
- In order to support accurate measurements towards the [Owner’s] sustainability goals, all vehicles must be **solely dedicated** to the [Owner] and **cannot be used for other sites**.

# Elevator Maintenance SOW (campus-wide)

- The Proponent shall assign a **dedicated maintenance technician** to this contract.
- This individual must be **solely assigned** to this contract and will perform all preventative maintenance & major repairs within the building zone.
- The dedicated maintenance technician shall be provided with office space within the building zone as their base of operations.



# Impact of Overly Prescriptive Specs on Vendor Proposals

- “tie the hands” of vendors regarding the work and manner in which it is undertaken
- Can significantly increase cost & schedule
- Removes flexibility to offer strategies & innovations for the specific environment
- Limits the maximum accountability & responsibility vendors have to perform



# SOW Development

## *A “Great” Scope-of-Work:*

# What would an Expert Vendor need (or want) to know?

What will help them provide you with the **best price**?

What will help them **minimize their contingencies**?

What will prevent them from **walking away**?

# Scope of Work Template

## 1. High Level Overview & Objectives

## 2. Existing Conditions / Current Environment

1. Current Condition Volumes, Data, Performance
2. Current operation, incumbent vendor resources
3. A day in the life of...

## 3. Description of Deliverables/Reqs/Outcomes

- Budget
- Schedule
- Project/Service Details and Requirements
- Additional Information

## 4. Project Risks & Concerns

2.1	<b>High Level Overview</b> <<Provide a very high level summary of this project/service to quickly understand what we are looking to procure/achieve. This should only be a few sentences (or a paragraph long).>>
2.2	<b>Goals and Expectations</b> <b>Project/Service Goals &amp; Expectations</b> <<Identify the major goals/expectations or desired outcomes of the new project/system/service. This should include identifying the tasks that must be achieved to receive a 100% satisfaction at the end of this project/service>>  <b>Vendor Goals &amp; Expectations</b> <<Identify the major goals/expectations or desired outcomes of the new vendor. This should include the tasks that must be achieved to receive a 100% satisfaction at the end of this project/service>>
2.3	<b>Detailed Description of Deliverables</b> <b>Budget</b> << Is there a budget for this project (if so, what is it)? Is this budget 'fixed' (we cannot exceed this amount), or is this our goal/expectation? Provide as much information as we can regarding the estimate/budget>>  <b>Schedule</b> << Are there any time/schedule requirements that must be met? Are there any time constraints on the project or service that they need to operate in (final completion date, date the service must be in operation, project opening, normal business hours, after hours support, emergencies, etc)>>  <b>Project/Service Details and Requirements</b> << Provide all of the details and requirements that must be met to achieve high satisfaction? What are the minimum requirements that must be performed (by the vendor or by the service/project) to meet the goals/expectations? Provide all detailed specifications, standards, plans, drawings, etc >>  <b>Additional Information</b> << Identify if there is anything unique/special about this project/service that vendors may not have encountered in the past on any other project/service? Is there anything about this project that would make it unlike any other project that a vendor has done? Are there any unique conditions about this project/service? Are there any constraints that you have, or the system may have, or the vendor may run into? Is there anything that is excluded from this project/service that the vendor must be aware of? Are there any future conditions (outside of this scope of work), that the vendor should keep in mind? >>
2.4	<b>Existing Conditions / Current Environment</b> The University has made its best attempt to identify all known conditions of this project/service. The vendor should not assume that this is 100% complete or accurate.  << Provide as much information (as reasonably possible) so that the vendor can understand the current environment. This may include: • Background information about the user/client • Background information about the project/service • History about the project/service • Identify the major/greatest obstacles, issues, challenges that you have encountered in the past on this project/service (what are the major reasons we are looking to increase satisfaction) • If this is a renewal service, provide: how long has the service been in place, how many years has the current provider been in place, any performance numbers, financial numbers, satisfaction numbers, critical data, etc • Any performance documentation/reporting • Any current constraints • Overall satisfaction ratings on the existing project/service (and what has prevented you from providing very high customer satisfaction ratings)>>

# Scope of Work sheet

## PART #1 - BACKGROUND INFORMATION

1.) WHAT ARE YOU LOOKING TO PROCURE? In your own words, briefly explain what the project/service/product is about in order to quickly understand what needs to be procured. Try to describe at a high-level and avoid any technical language/abbreviations.

2.) BUDGET? If you have a budget for this project/service/product, please provide it. Do you have a Budget? If "Yes", What is Your Budget?

3.) ANTICIPATED SPEND? If you do not have a budget, do you have an anticipated spend on this project/service/product?

4.) CRITICAL DATES? Identify any special time requirements. Date the procurement needs to be awarded. Date the current contract expires.

5.) RISK: How "risky" is this procurement (think in terms of Overall Risk)?

6.) PROJECT TEAM Identify the project team.

7.) CRITICAL INFORMATION? Identify any critical information.

## PART #2 - SATISFACTION

1.) BASELINE SATISFACTION: Identify your overall satisfaction level of service, etc.). Rating is on a 1-10 scale.

2.) REASONS FOR DISSATISFACTION: If you did not provide a rating, please explain the issues/challenges that you have encountered. In a 1-10 scale.

3.) KEY MEASUREMENTS OF SUCCESS: What are the key measurements of success for this project/service/product? (e.g., satisfaction, quality, time, etc.). Think of project/service/product was a success.

1  
2  
3  
4  
5

## PART #3 - CURRENT CONDITIONS

Preparing a "perfect" scope of work can be difficult and challenging. Providing vendors with information about the current conditions or environment can be essential for them to provide a realistic proposal. This information can be just as useful as providing a great known conditions (as reasonably possible) so that the vendor can prepare a realistic proposal.

1. LOCATION CONSIDERATIONS:

- Where is the project/service/product currently located?
- Will the replacement be located in the same location?
- Any issues/risks/concerns that you have or foresee with the location?
- Anything that makes this location unique (that vendors may not know)?

2. RENEWAL SERVICES:

- Is this a "renewal" of an existing service, or is there currently a new contract?
  - This is a renewal
  - This is not a renewal, but this is something new
- How long has the service been in place?
- How many years has the current provider been in place (or has this been a new provider)?
  - Current contract is ending
  - Looking for improvements
  - Provide additional comments
- What major issues have you had with the existing/current service/product that you expect the new service/product/system to avoid or address?
- What major issues have you had with the existing/current vendor?

3. CRITICAL DATA:

- What critical data do you have on the current service/system/product? Once a picture of your current environment so the vendors know where you are at, and number of stakeholders, work orders, response times, reports, etc.
- What critical data are you missing (data you don't have or won't be able to get) that you need to know?

4. BACKGROUND INFORMATION:

- Provide a summary of the current environment:
- If applicable, provide a summary of the existing service (what it does, how it operates, the functions they perform, how their service impacts the organization, the stakeholders they are involved with, key reporting that they provide, strengths of the current service provider, weaknesses and constraints, etc.).
- If applicable, provide a summary of the existing vendor (what they do, how they operate, the functions they perform, how their service impacts the organization, the stakeholders they are involved with, key reporting that they provide, strengths of the current service provider, weaknesses and constraints, etc.).

5. CONSTRAINTS:

- Identify any current constraints or issues that this project/service is facing.
- Is there anything that is different or unique about this project/service (that would make this more challenging for vendors)?
- Are there any future or related projects that may have an impact on this project/service?

## PART #4 - DESIRED OUTCOMES

1.) PROJECT/SERVICE GOALS:

- Identify the major goals, expectations, or benefits of the new project/system/service.
- What must the project/service accomplish to receive a 10-out-of-10 rating?
- If this is a renewal service, is the goal to maintain the current level of service/performance?
  - Does not apply (this is not a renewal service)
  - Yes, we are expecting to simply maintain current service/performance
  - No, we expect to increase service/performance (identify the critical areas to be improved below.)

2.) VENDOR GOALS:

- Identify any specific goals, expectations, or benefits of the vendor (that may not be the same as the project/service goals).
- What must the vendor accomplish to receive a 10-out-of-10 rating?

3.) SCHEDULE / TIMING:

- Are there any critical dates that the vendor should be aware of? (e.g., planned shut downs, holidays, days that vendor is not allowed to work)
- Are there any critical hours of operation that the vendor should be aware of? (e.g., after hours, hours that the vendor can access the building, hours that the vendor can access the system)
- Are there any other projects that may impact the time/schedule?

4.) COSTING / FEE:

- Are you expecting the cost/fee to be proposed as a:
  - Lump Sum / Fixed Price
  - Unit Pricing
  - Other
- What are the top 5 main deliverables/products/services (what are the major areas you expect to purchase with)?
  - 
  - 
  - 
  - 
  -
- Are there any alternatives or options that should be considered? (e.g., like pricing for?)

## PART #5 - SCOPE OF WORK

1.) DETAILED SCOPE AND REQUIREMENTS:

- Provide all of the details and requirements that must be met to achieve your desired outcomes.
- Describe each of the deliverables/products/services to be provided by the selected vendor for this project (note: each of the main deliverables identified in Part #4-4 should be described here).
- What are the minimum requirements that must be performed (by the vendor or by the service/project) to meet the goals/expectations?
- Are you providing detailed specifications, design documents, plans, drawings, minimum standards?
  - Specifications are attached
  - No additional specifications will be provided
- Provide all requirements that must be met to achieve a 100% performance satisfaction.

2.) SPECIAL/UNIQUE REQUIREMENTS:

- Identify any unique requirements about this project/service (that may not be typical to other "similar" projects that the vendor has done. Is there anything about this project that would make it unlike any other project that a vendor has done)?
- Are there any constraints that you have, or the vendor may have, or the system may run into?
- Is there anything that is excluded from this project/service that the vendor should keep in mind?
- Are there any future conditions (outside of this scope of work), that the vendor should keep in mind?
- Identify if you have made any assumptions (about the service/project or about the vendor)?

# The “Silver Bullet” of SOW Development



*Issue an*  
***RFN***  
*to the Vendor*  
*Community*

*But with the RIGHT intentions...*

# An RFN is NOT...

- Surveying general capabilities...
- Fishing for data...
- Seeing what's out there...

# Questions that an RFN can Answer

1. What information do Vendors need in order to develop an accurate proposal?
  - with minimal contingency?
2. How should the scope be structured (and why)?
3. What can the Owner begin working on **now** to facilitate an efficient project once it is awarded?
4. Any other specific questions...

# RFN Template

## SECTION 1: RFN PURPOSE

The <<Agency>> is issuing this RFN to identify vendors with experience in providing <<Service>>.

The information obtained from this RFN is a preliminary step in identifying what information is needed to develop a subsequent RFP. This RFN is not a request for a cost or confidential information. A response to this RFN is not binding.

## SECTION 2: COUNTRY BACKGROUND

This section provides a brief background of the country.

### Background

Provide a summary of the

- How is the existing system?
- How is the existing system?
- Describe the existing system?
- How is the system?
- Who are the critical stakeholders?

### Existing Contract / Service

If this is a renewal of an existing contract, please provide the following information:

- Major functions of the contract?
- When is the existing contract due?

### Important Data / Historical Data

Provide any important or historical data that may be relevant to the project.

### Challenges

Provide a summary of the challenges that may be encountered during the project. Include the cost of the service, need, etc. This can include:

### Uniqueness

Identify anything that may be unique or different about the project that you want to be made aware of.

## SECTION 4: FORMAT AND SUBMISSION REQUIREMENTS

### Submission Requirements

Proposals must be submitted in the following format:

Please respond to the questions in the following format:

General Information

The <<Agency>> is issuing this RFN to identify vendors with experience in providing <<Service>>.

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## RFN RESPONSE

Please respond to the questions in the following format:

1. Are the expectations realistic or not?

Expectation #1

Expectation #2

Expectation #3

Expectation #4

Expectation #5

Expectation #6

Expectation #7

Expectation #8

Expectation #9

Expectation #10

Expectation #11

Expectation #12

Expectation #13

Expectation #14

Expectation #15

Expectation #16

Expectation #17

Expectation #18

Expectation #19

Expectation #20

Expectation #21

Expectation #22

Expectation #23

Expectation #24

Expectation #25

Expectation #26

Expectation #27

Expectation #28

Expectation #29

Expectation #30

Expectation #31

Expectation #32

Expectation #33

Expectation #34

Expectation #35

- Knowing that the <<Agency>> is not an 'expert' in this industry, are there any other options, ideas, new/next practices, or ideas that should be considered? (1 Page Maximum)

- What information would you need to see in a potential RFP to submit an accurate proposal with minimal uncertainty and contingency included in the cost? Please be as specific as possible. (1 Page Maximum)

- Are there specific items (internally) that the <<Agency>> can begin working on now to facilitate a more efficient program once the awarded vendor is selected? If so, what would those be? (1 page Maximum)

# How to Prepare an RFN

## 1. Create the Scope of Work Sheet

- Emphasis on defining Current Conditions
- Include any objectives/requirements for the Future Conditions that will be different than Current

## 2. Use the RFN Template

- Copy/Paste the draft SOW
- Refine the RFN questions to meet project-specific needs

Run the RFN **in parallel** with RFP development  
**= NO TIME LOST!!!!**



# RFN Response – Critical Info

Vendor responses may inquire about...

- Volumes, throughputs
- Occupancy
- Entry/Access
- Rules/regs/restrictions
- Schedules
- Current practices / ops
- Equipment condition
- Current service levels
- Stakeholder involvement
- Etc...

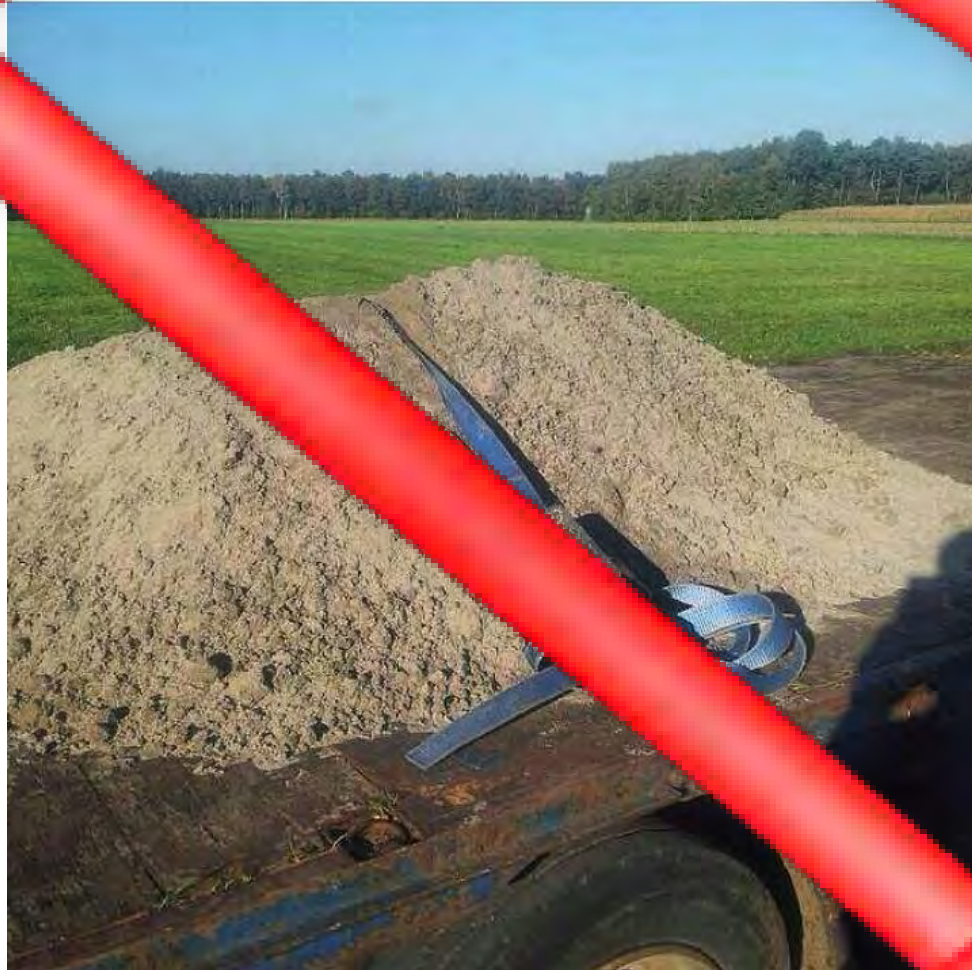
**Answer as  
much as you  
can  
=  
SOW  
complete!**

# Example: **Seattle City Light**

## RFN Process (in parallel with RFx Development)

- **Friday:** created RFN (Draft Scope + RFN Template)
- **Monday:** Seattle advertised the RFN
- **Following Monday:** Vendors submitted RFN responses
- **Tuesday:** “Action Item” list for Seattle’s project team
  - ***Vendors even proposed re-written scope language!***
- **Thursday:** Seattle’s Project Team provided answers & documents
- **Friday:** Released the final RFx with expert-augmented Scope

...ve got it covered



Don't release and "hope for the best"

# When in Doubt...Issue an RFN!!!

**Leverage expertise from the industry to check:**

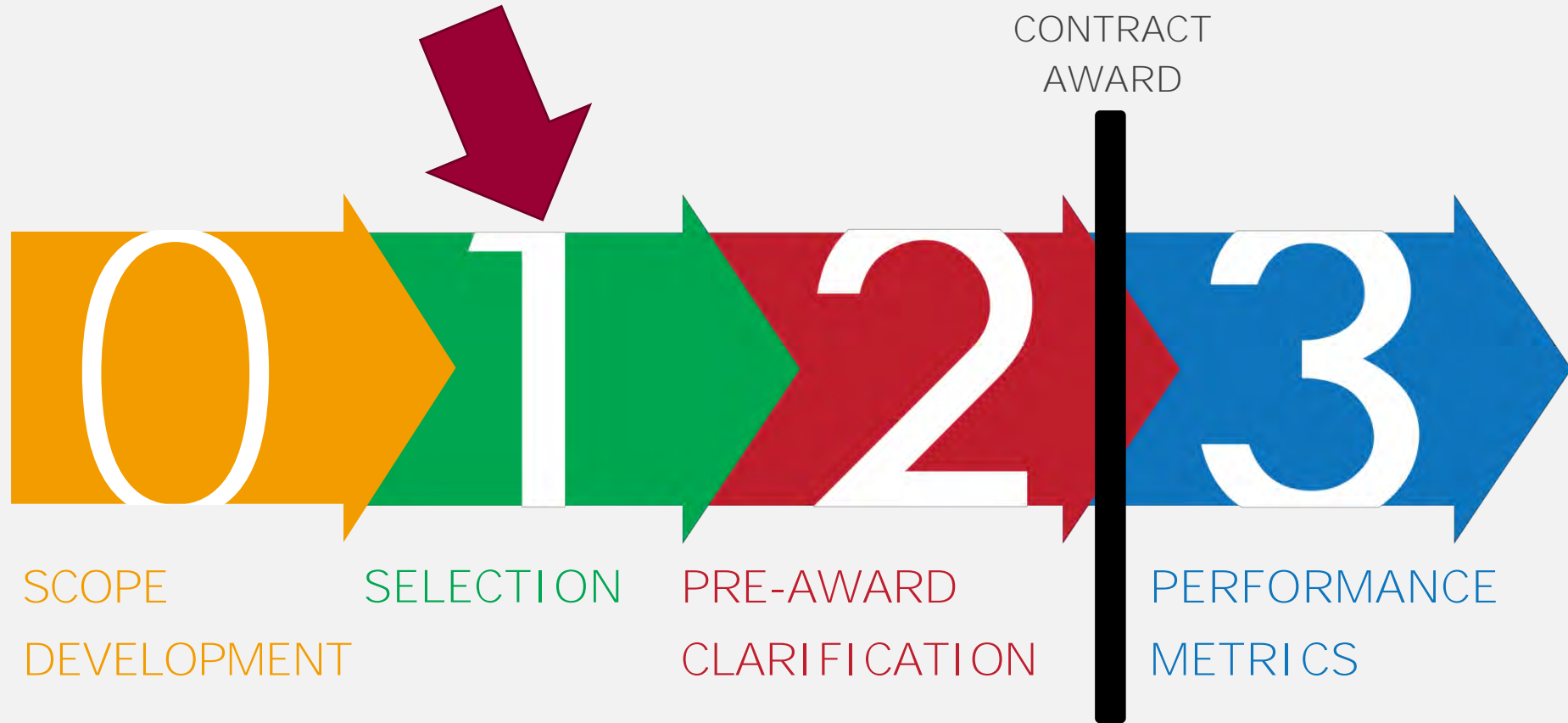
- Is our approach feasible?
- What are realistic options?
- What information do vendors need to prepare an accurate proposal with minimal contingency?

**The Client does **NOT** need to know every detail!**

1. Define current conditions
2. Define objectives / requirements / Scope
3. Leverage industry feedback

# Expertise-Driven Project Delivery (XPD)

7.05, 208B, 11:45am





# Primary Objective: Minimize Surprises





# Project Background

- Budget: **\$67M** | 188,000 SF
- Public space / conventions
  - 40,000 SF Ballroom
  - Meeting rooms
  - Hold two 1,000 person conventions - simultaneously
- Schedule
  - RFP Released on 11/21/2016
  - 61 calendar days to submit proposals
  - 12 calendar days to evaluate
  - 29 calendar days for clarification and award



# Procurement Results

## CRITERIA & WEIGHTS

NO	CRITERIA	WEIGHTS
1	Cost	250
2	Risk Assessment	225
3	Value Assessment	175
4	Interviews	350

1,000

## RAW DATA

FIRM A	FIRM D
\$ 65,605,923	\$ 60,394,872
7.9	8.4
8.8	8.6
8.2	7.6

## PRIORITIZED DATA

FIRM A	FIRM D
230	250
212	215
172	164
350	324

Price Points (250): 23% 25%

Performance Points (750): 73% 70%

**TOTAL POINTS (1,000): 96% 95%**

# Contractor's Actual Response

- In last 2 City projects that we won, we were about 5% below the average.
- Due to experience of XPD, we included no contractor contingency (\$1 Million)
- Preferred numbers from subcontractors who prefer working with our team (\$700K)
- Self-perform demolition, concrete, and carpentry activities with no mark-ups (\$500K)
- All of our personnel are from the Rochester area (\$300K)
- We did not include a tower crane for this project (\$400K)
- We did not contract to one mechanical and electrical to minimize mark-ups (\$320K)
- There were discussions in the market about teaming up with one excavator / driven pile contractor which was not the team our company used on this project (\$300K)
- We did not assume a full staff for the entire 2.5 years. During certain phases of the project a full staff will be dedicated to this project. However, during smaller phases our staffing will be adjusted to fit the scope (\$250K)

# Conclusion & Takeaways

# Operations-Focused Procurement Tools

- Clear SOWs give advantage to expert vendors
- Evaluate vendor understanding of the SOW
- Identify, prioritize, and minimize risks to SOW
- Encourage innovative solutions
- *All within a fair, transparent, and competitive environment*

# Checklists, Tools, and Templates

# More than just Templates...



## ...Vendor education is critical!



# Our Research Mission

- We integrate with organizations to provide hands-on training to enhance efficiency, accountability, and bottom-line performance.
- ON-SITE Workshops available upon request
  - Variety of topics within FM, project delivery, and program management

Want a free copy of our SOW  
or RFN template? Pass me  
your business card!

[Jake.Smithwick@uncc.edu](mailto:Jake.Smithwick@uncc.edu)