

Instructions for Completing a Scope of Service

July 2014

Delete this page before submitting.

Task Work Orders must be in compliance with the requirements of Section 287.058, Florida Statutes. Task Work Orders must include the following:

- A scope of work that clearly establishes all tasks the principal investigator is required to perform
- Specific deliverables that must be provided and accepted in writing prior to payment, each deliverable must be directly related to a task specified in the scope of work and must identify the minimum level of service to be performed.
- A schedule of milestones
- A budget by task
- Division of Sponsored Research approval

Submit Scope of Service (Exhibit A) and a budget sheet with required documentation in Word format to patti.brannon@dot.state.fl.us

Delete this page before submitting.

Exhibit A – Scope of Service

Project Title:

Principal Investigator: Name
 University
 Address
 Email Address
 Phone Number

DSR Contact: Name
 University
 Address
 Email Address
 Phone Number

Project Manager: Name
 Florida Department of Transportation
 Office
 Address
 Email Address
 Phone Number

Background Statement

Describe the need for the research.

Project Objective(s)

Describe the purpose and objective(s) of the project.

Supporting Tasks and Deliverables

Describe the task(s) necessary to achieve the objective(s) and deliverable(s). Each deliverable must be directly related to a specified task. All deliverable(s) will be submitted to research.center@dot.state.fl.us

Final Task:

The following language should be included as the final deliverable:

Ninety (90) days prior to the end date of the task work order, the university will submit a draft final report to research.center@dot.state.fl.us. The draft final report will contain (insert description of what the draft final report will contain). The draft final and final reports must follow the Guidelines for University Presentation and Publication of Research available at http://www.dot.state.fl.us/research-center/Project_Mgt_Resources.shtm. The report must be well-written and edited for technical accuracy, grammar, clarity, organization, and format.

Deliverable: Upon Department approval of the draft final report, the university will submit the Final Report on two (2) CDs. Both CDs shall contain the report in PDF and Word formats. CDs should be labeled in a professional manner and include contract number, task work order number, project title, and date.

The final report is due by the end date of the task work order and should be mailed to the Florida Department of Transportation, Research Center, 605 Suwannee Street, MS 30, Tallahassee, FL 32399-0450.

Use of Subcontractor(s)

If a subcontractor is to work on the project, describe the work the subcontractor will perform. Attach a scope of work and budget for the subcontractor.

Use of Graduate Student(s) and other Research Assistants

Describe the work any student(s) will perform.

Equipment

Rule 69I.62.007, F.A.C states “For statewide financial reporting purposes, all tangible personal property with a value or cost of \$1,000 or more and having a projected useful life of one year or more must be capitalized. Any hardback book with a value or cost of \$25 or more and having a useful life of one year or more that is circulated to students or the general public, and any hardback book with a value or cost of \$250 or more that is not circulated must be capitalized.

In addition to the \$1,000 threshold, the Department also has a list of Exception Class Property available at http://www.dot.state.fl.us/research-center/Project_Mgt_Resources.shtm

If equipment is to be purchased on a project the scope must include justification of specific requirements for the project and why the equipment should be purchased instead of leasing (leasing of equipment is preferred). A description of the equipment to be purchased must be included with a copy of the quotes obtained.

Expenses

Describe any expense items to be purchased, if applicable.

Travel

Describe travel that will take place, including justification of the need for travel, if applicable. Include the traveler’s (name/position), location(s), purpose, and duration.

Standard Research Center policy is that travel to conferences is not an allowable expenditure.

If travel is budgeted, the following text must appear, as worded, in this section:

All travel shall be in accordance with Section 112.061, Florida Statutes. FDOT employees may not travel on research contracts. Travel must only be requested when teleconference and web meetings cannot achieve the purpose of the travel. The maximum amount of travel is limited to \$(insert amount). The maximum amount of indirect cost on travel is limited to \$(insert amount).

Project Kickoff Teleconference

A kick off teleconference is required for all projects. The following language must be included:

The principal investigator will schedule a kickoff teleconference that shall be held within the first 30 days of execution. The project manager, principal investigator, and research performance coordinator shall attend. Other parties may be invited if appropriate. The purpose of the meeting is to review the tasks, deliverables, and deployment plan.

Project Closeout Teleconference

A closeout teleconference is required for all projects. The following language must be included:

The principal investigator will schedule a closeout teleconference that shall be held during the final 30 days of the task work order. The principal investigator, project manager, and research performance coordinator shall attend. Other parties may be invited, if appropriate. The purpose of the meeting is to review project performance, the deployment plan, and next steps.

Performance and Financial Consequences

Work not identified and included in this scope of service is not to be performed and will not be subject to compensation by the Department.

Financial consequences for unsatisfactory performance are referenced in Section 10 and Section 11 of the Master University Agreement, Form No. 375-040-64.

Publication Provision

If at any time during a TWO the University desires to publish in any form any material developed under the TWO, the University must submit to the TWO Manager and the Research Center at research.center@dot.state.fl.us a written abstract and notification of intent to publish the material and receive the TWO Manager’s concurrence to publish. Such approval to publish shall not be unreasonably withheld. If the TWO Manager does not provide a written response within 30 days after receipt, the University may publish. The publication must include the following language:

“The opinions, findings and conclusions expressed in this publication are those of the author(s) and not necessarily those of the Florida Department of Transportation or the U.S. Department of Transportation.”

Project Milestones

Please ensure you have allocated sufficient time to complete the work identified in this scope.

Task Description	Anticipated Timeframe for completion (in months)
Total duration of project	