



Statement of Work Essentials:

What Every Agency Needs to Know

Undefined expectations and unclear requirements can create significant challenges in any government project. A well-crafted Statement of Work (SOW) establishes clarity from the very beginning. In this guide, you will learn what an SOW is, why it is essential in government procurement, and the key elements that ensure alignment and accountability between agencies and vendors. You will also gain an understanding of components that contribute to a disciplined, well-managed project.





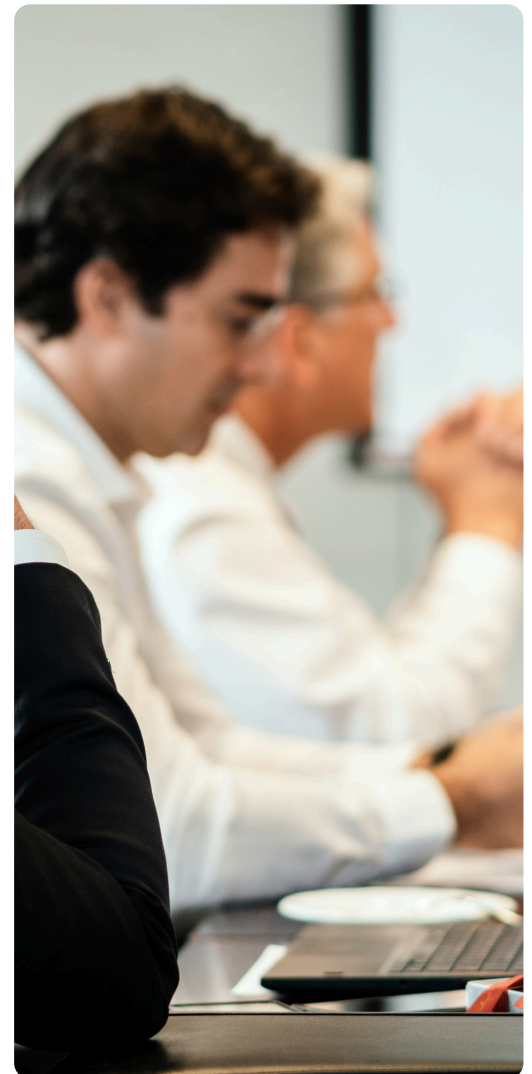
What is a **Statement of Work**?

A Statement of Work (SOW) is a formal document that defines the specific tasks, deliverables, and performance expectations a contractor is being asked to fulfill. It serves as the foundation to a project, clearly outlining what work will be done, how it will be evaluated, and the standards the government will use to determine successful completion.

Why it **Matters**

When a government agency begins the process of purchasing a new case management system, the Statement of Work becomes the foundation for everything that follows. It defines what success looks like, how the system should perform, and what the agency expects from the vendor.

A well-written SOW ensures everyone involved understands exactly what will be delivered. It clarifies the scope, technical and performance requirements, security compliance, and additional details relevant to the project. It also defines what "done" looks like. The SOW is a shared roadmap between your agency and the vendor. When it is written clearly and thoughtfully, it ensures the solution you purchase meets its purpose and provides the tools needed to serve the public effectively.





Key Elements of Statement of Work

✔ Background and Objectives

✔ Scope of Work

This section of the statement of work defines what work will be done, boundaries of the project, key activities and outcomes.

✔ Security

What security or regulatory standards are required.

✔ Tasks and Deliverables

The detailed list of work the vendor will perform and what they will provide.

✔ Schedule

When each task or deliverable is due.

✔ Place of Performance

Where the work takes place (for SaaS procurements this is typically described as remote)

✔ Period of Performance

Timeframe for the project.

Example Statement of Work

Background & Objectives

Our agency currently relies on multiple spreadsheets, documents, and manual processes to track case information, correspondence, and reports. This approach is inefficient, error-prone, and makes it difficult to generate accurate, timely updates for leadership or oversight bodies.

The objective of this project is to implement a cloud-based case management and tracking system to consolidate information into a single, secure platform. The system should streamline workflows, reduce duplication, improve data accuracy, and make it easier to track case activity and outcomes throughout the lifecycle of each case.

Scope of Work

The vendor shall provide, configure, and implement a commercial off-the-shelf (COTS) case management solution that meets the following general requirements:

- **Cloud-based and secure:** Hosted in a FedRAMP moderate authorized environment.
- **Configurable by non-technical users:** Authorized agency personnel must be able to adjust fields, forms, workflows, and reports without IT assistance.
- **Comprehensive tracking:** The system will serve as the single repository for all case-related data, documents, notes, and communications.
- **Workflow automation:** Support customizable workflows, routing, and notifications to manage reviews, approvals, and status changes.

Security and Compliance

- Must support multi-factor authentication (e.g., PIV card or similar).
- System must include automatic session timeouts, audit logs, and role-based permissions.
- Access to sensitive cases or documents must be limited to authorized personnel.
- Agency administrators must be able to manage users and permissions without vendor involvement.

Example Continued...

Tasks and Deliverables

Case Management Capabilities

The system shall enable users to:

- Create, update, track cases and associated records.
- Assign cases to users and define roles or teams.
- Maintain a chronological record of all case activity.
- Automate status updates, routing, and notifications.
- Restrict edits once a case is closed.
- Generate reports on open, closed, or pending cases.
- Provide an online intake form for the general public to submit complaints and supporting documentation securely.

Reporting and Analytics

The system shall include flexible reporting features to support operational and oversight needs, including:

- Ad hoc and scheduled reports (e.g., case status, workload, trends).
- Export options to Excel, CSV, or PDF.
- Configurable dashboards tailored to user roles.

Maintenance and Support

The vendor shall provide system maintenance, including security patches, software updates, and user support throughout the contract period.

Period of Performance

Period of performance is for an initial year, plus four option years.

Place of Performance

Project will be completed remotely, there is not an expectation for the vendor to perform work onsite.



About **CMTS**

At CMTS, our mission is to make life easier for investigative agencies by helping them streamline their processes and work more efficiently. We provide a secure, configurable case management platform built to support the way your team works —not the other way around. Backed by responsive support and a deep understanding of investigative workflows, CMTS combines powerful features with dedicated service to ensure you have the tools and partnership you need to succeed.

CMTS helps federal, state, and local organizations streamline workflows, manage sensitive data, and improve visibility across the case lifecycle. Developed by WingSwept, a cybersecurity and IT services provider, CMTS is FedRAMP® Moderate authorized and built to meet the high standards of security, compliance, and usability.

