

Clarifying scope definition prior to beginning a project can save time and alleviate tensions between wind farm owners and contractors.

SCOPE DEFINITION is likely the single greatest source of frustration on all wind projects. Simply put, the scope is the link that binds owners and contractors to the same common goal. However, those scopes usually fail to recognize that both parties have vastly differing motives to achieve that goal. Getting the scope definition “just right” before the work is started can eliminate the root cause of that frustration.

As the wind industry continues to mature, there are many sources of scopes available that have been both tested and proven in the field. Unless the entire project represents a unique “one-off” situation, you can assume that someone has developed a basic scope that will encompass about 75 percent of the initial effort. Many established engineering and project management firms keep databases of past work scopes to draw upon for creating a base scope. Most construction companies will also gladly offer up their boilerplate definitions for the opportunity to see it again on a future bid request.

Making modifications of existing scopes to tailor to the particular situation is far more cost efficient and less risky than writing one from scratch. When modifying a scope for your particular use, remember to never include items that don’t help you achieve your project goals. Overly describing the details usually results in a scope that fails to focus on what needs to get done and only states how to get it done. Defining contractors’ “means and methods” on how to complete their work limits their ingenuity and creativity to improve upon the construction process. Many times simple solutions to complex problems can be found by taking advantage of a contractors’ experience in a competitive bid environment.

A scope that is all goals and no details presents just as many issues as an overly defined scope. Loosely defined scopes usually originate from either a lack of experience or by simply being time constrained when preparing the package. Anytime that a two- or three-page document describes a potential multimillion-dollar bid package you are likely looking at a potential problem, regardless of whether you represent the owner or the contractor. A never-ending stream of con-

tractor clarifications can grind the bid process to a halt for both sides of the proverbial fence. Unless the scope issues are faced head on during the bidding process it will likely result in too many scope clarifications, pricing options, or allowances to properly evaluate which bid presents the best value.

Owners always have the power to pull the bid back in and spend the time fully defining and further developing the problematic areas. While this can be as complex as reworking the entire package, it is usually just as simple as fully addressing the contractor’s questions and concerns. Remember that all risk is priced accordingly. Eliminating some of the risk that is tied to uncertainty can be very cost efficient for a project.

Owners need to take time to formulate thorough and complete responses to the contractor’s questions and then present a consistent response back to all the potential bidders at the same time. Whenever a significant clarification is made, ensure that the contractors have the time to properly assess the information and adjust their pricing accordingly. The cleanest scope clarification can be for naught if the contractors don’t have time to fully amend their pricing. Slight schedule slippage on the front end is far easier to recoup than time lost from performing scope alignments later on.

If a poor scope does go to construction and issues start appearing, it is usually best to just stop and perform a complete scope alignment. As soon as is practical, pull the concerned parties into a room and go line item by line item addressing what each perceives as their responsibilities while documenting any clarifications. Never wait until the work is completed to start discussing who is going to pay for what, since at that point neither party is in a neutral position and tensions generally start to rise. Remember to document everything, and if necessary verify scope alignment several times during the course of the project. Done properly, the scope alignment process does not have to be stressful. Always keep in mind that on projects everyone has the same goal, and the scope is simply the glue that binds it all together. ✎

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