

CAUNCE
O'HARA

THE BUSINESS
INSURANCE BROKERS



Statement of
work template

► Introducing Counce O'Hara

Counce O'Hara & Co Ltd offer specialist small business insurance to freelancers, contractors, self-employed consultants, and small businesses across the UK.

Since 1995, we've built a reputation as an expert in business insurance for the self-employed and small business sector.

We offer industry-specific cover for IT contractors and consultants, management consultants, marketers and creatives, engineers, rail contractors, offshore oil and gas contractors, construction contractors, social workers, teachers and tutors, finance professionals, recruiters and many more – all supported by our commitment to customer service.

Year on year our clients trust us to protect their businesses with insurance, which means they can work with the peace of mind that they are covered if anything goes wrong.

Counce O'Hara a division of Markel International, a Lloyd's market insurer who underwrite most of our business insurance policies.

Whatever your profession, we can provide you with the correct level of comprehensive indemnity insurance and commercial liabilities cover you need to protect your business.

'We've got you covered'

► Contents

- 2 - Introduction to Caunce O'Hara
- 3 - Contents
- 4 - Template purpose and disclaimer
- 5 - Project overview
- 6 - Scope of work and deliverables
- 7 - Timelines and responsibilities
- 8 - Acceptance criteria
- 9 - Payment terms
- 10 - Change control process
- 11 - Sign-off
- 12 - Specialist cover for small businesses

► Statement of work template

This statement of work template is designed to help businesses clearly define the scope, deliverables and expectations of a project before work begins. It is provided as a general guide only and should not be considered financial, legal or professional advice. Completion of the template does not guarantee a legally binding agreement. Businesses remain responsible for assessing whether the template is suitable for their own circumstances.

Businesses should adapt this template to reflect their own circumstances, objectives and requirements, and seek independent professional advice where appropriate. Caunce O'Hara does not accept responsibility for decisions made based on the information contained in this template. Caunce O'Hara will not review, verify or approve statements of work completed using this template.

Where this template is used in connection with contractor, consultant or freelance engagements, businesses should consider obtaining independent legal and tax advice regarding employment status and IR35. The existence of a statement of work alone will not determine a contractor's employment status or whether an engagement falls inside or outside IR35.

► Project overview

Project name	
Client	
Supplier/contractor	
Project start date	
Project end date	
Project objective	

Provide a brief summary of the project and the intended outcome:

► Scope of work and deliverables

Provide a detailed explanation of the work that will be carried out. Clearly define what is included in the project and what is out of scope. Clearly listing exclusions can help prevent misunderstandings and scope creep later in the project.

In scope:

-
-
-
-

Out of scope:

-
-
-
-

List the specific outputs, services or products that will be provided to the client.

Deliverables:

-
-
-
-

► Timelines and responsibilities

Outline the key project phases, milestones and deadlines.

Milestone	Description	Target date

Clearly define who is responsible for each aspect of the project.

Responsibility	Client	Supplier/contractor

► Acceptance criteria

Define the standards that must be met before the project can be approved and signed off as complete.

Examples may include:

- Deliverables meet the agreed specifications.
- Work has been completed within the agreed timescales.
- Testing or quality checks have been completed.
- Written approval has been received from the client.

Project-specific acceptance criteria:

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► Payment terms

Provide details of fees, invoicing arrangements and payment schedules.

Total project fee: £

Payment structure		
Payment stage	Amount	Due date

Invoicing terms	
Invoices will be issued within:	
Payment is due within:	
Late payment terms:	

► Change control process

**Any work requested outside the agreed scope must be reviewed and approved by both parties before it begins.
Changes may affect the agreed costs, timeline or deliverables.**

► Sign-off

By signing below, both parties acknowledge that they have reviewed and agreed to the contents of this statement of work.

This statement of work should be considered alongside any applicable contract or service agreement between the parties. Whether this document is legally binding will depend on the wider contractual arrangements and the specific circumstances of the engagement.

Client	
Name:	
Signature:	
Date:	

Supplier/contractor	
Name:	
Signature:	
Date:	

► Specialist cover for small businesses

Caunce O'Hara has been providing business insurance to freelancers, contractors and small businesses since 1995.

Our experience has enabled us to fully understand the needs of small business owners and to tailor our policies accordingly.

Cover we offer includes:

- Professional indemnity insurance (PI)
- Public liability insurance (PL)
- Employers' liability insurance (EL)
- Products liability insurance
- Office contents insurance
- Legal expenses insurance (LEI)
- Cyber insurance
- Directors and officers insurance
- Commercial crime insurance
- Personal accident insurance
- Portable equipment insurance
- Tools insurance

For a quotation, please call 0333 321 1403



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Counce O'Hara & Co Ltd is authorised & regulated by The Financial Conduct Authority under firms reference number 306183. To verify this visit www.fca.org.uk/register. Markel Corporation is the ultimate holding company for Counce O'Hara & Co Limited.



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