ILLUSTRATIVE SAMPLE - NOT A QUOTE, CONTRACT, CUSTOMER PROJECT OR WORK AUTHORIZATION

FROM SCOPE BRIEF TO WRITTEN OFFER

Know what a reviewable *proposal should contain.*

A five-page illustrative structure for keeping property context, scope, assumptions, responsibilities, operating controls, changes and closeout visible before work is authorized.

DOCUMENT CONTROL

REFERENCE	PROPERTY	STATUS	PRICING
SAMPLE-PROP-001	Illustrative commercial property	Example only - not issued	Not included

ONE TRACEABLE PATH

01 Scope brief

02 **Proposal standard**

03 Written authorization

04 Closeout standard

HARD BOUNDARY

This sample contains no property-specific price, offer, schedule or acceptance mechanism. Only the applicable written property-specific proposal or work order can authorize work.

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01 CONTEXT + SCOPE

Carry the property brief forward.

An actual proposal should distinguish supplied facts, observations, assumptions and open decisions before defining the offered work.

PROPERTY AND DECISION CONTEXT

State what is known - and what is not.

FIELD	ILLUSTRATIVE ENTRY
Request and reported condition	Visible buildup reported on selected exterior areas; not independently confirmed. The decision is a reviewable scope before a method or price is selected.
Operating context	One public entrance and one delivery route are assumed to remain usable; actual controls need approval.
Open decisions	Exact zones, quantities, materials, test areas, access, utilities, drainage, work window and approvals.

SCOPE REGISTER

Give every area a defined position.

ID	ILLUSTRATIVE AREA	SCOPE POSITION	DECISION NOTE
Z-01	Selected upper east elevation	Base scope	Boundaries require an approved elevation schedule.
Z-02	Main entrance canopy	Base scope	Work window and route controls remain open.
Z-03	Service-side concrete	Optional alternate	Property decision required.
Z-04	Areas not shown	Excluded	No area is included by implication.

PRICING BASIS

Make the commercial basis reviewable.

ITEM	BASIS	SAMPLE POSITION
Base-scope price	Fixed, unit, area or other stated basis	Defined only in a property-specific proposal.
Alternates	Separate quantity and price basis	Defined only in a property-specific proposal.
Taxes, fees and terms	Explicit written terms	Not included in this sample.

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02 METHOD + DEPENDENCIES

Technology is a method - not the promise.

A proposal should state the approach by zone, the conditions that must be confirmed and the alternative when the preferred method is not suitable.

METHOD REGISTER

Tie each method to a zone and decision.

ZONE	PROPOSED POSITION	ALTERNATIVE	PREREQUISITE	LIMITATION
Z-01	Aerial, lift-assisted or ground-based option after review	Re-scope access or defer	Surface, surroundings, water and authority reviewed	No method selected by this sample
Z-02	Ground or access-assisted treatment after review	Test area or alternate treatment	Material and operating window confirmed	No result guarantee
Z-03	No method while alternate is unapproved	Exclude from current offer	Written owner decision	Not included by implication

ASSUMPTIONS

Expose the conditions beneath the offer.

- ☐ Owner-approved zone schedule
- ☐ Available material information
- ☐ Property-provided access decisions
- ☐ Defined water and utility source
- ☐ Approved operating window
- ☐ Known drainage and washwater controls
- ☐ Weather and stop conditions
- ☐ Named change-authority contact

SEPARATE QUALIFIED DECISIONS

Keep specialist authority outside the maintenance claim.

DECISION	PROPOSAL BOUNDARY
Material, engineering or structural review	Provided by the property or another appropriately qualified party unless separately included.
Leak source, hazardous material or environmental review	Not inferred from routine cleaning or field photographs.
Accessibility, traffic layout, aviation or other authority	Confirmed for the actual property, method and jurisdiction before work.

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03 OPERATING PLAN + CHANGES

Put the active property into the proposal.

Entrances, routes, occupants, utilities, staging, weather and reopening criteria are part of the work - not day-of details.

OPERATING-CONTROL SCHEDULE

Name the decision owner and current status.

TOPIC	ILLUSTRATIVE REQUIREMENT	DECISION OWNER	STATUS
Entrances and routes	One public entrance and delivery route remain usable	Property representative	Approval required
Pedestrians and vehicles	Property-specific separation and temporary controls	Provider + property	Plan required
Water, drainage and washwater	Sources, responsibility and handling stated in writing	Provider + property	Unconfirmed
Weather and stop conditions	Method-specific limits and pause authority	Provider	Required
Reopening	Objective property-specific criteria by affected zone	Provider + property	Required

OWNER RESPONSIBILITIES

Make approvals and property inputs visible.

- ☐ Approve zones, priorities or layouts
- ☐ Supply available records and known material information
- ☐ Identify restricted areas and property rules
- ☐ Approve windows, routes, closures and staging
- ☐ Coordinate occupant or staff notices
- ☐ Name the person authorized to approve changes

WRITTEN CHANGE CONTROL

No material change enters the scope informally.

CHANGE ID	REQUEST	SCOPE / PRICE EFFECT	AUTHORIZATION	STATUS
SAMPLE-CH-01	No real change requested	Not applicable	Not authorized	Example only

A change to area, quantity, method, material, operating window, property responsibility, schedule or price should not enter the working scope until the applicable written authorization is recorded.

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04 ACCEPTANCE + CLOSEOUT

End against the same scope that began the work.

An actual proposal should define how completed, deferred, inaccessible and excluded areas are recorded - and what the handoff does not prove.

ACCEPTANCE FRAMEWORK

Write the observable standard before work.

- [ ] Every authorized zone receives a disposition
- [ ] Completed and inaccessible areas remain distinct
- [ ] Test-area or appearance criteria are written
- [ ] Exceptions and authorized changes stay traceable
- [ ] Photographs identify only the visible area and time
- [ ] Completion does not imply concealed-condition or compliance conclusions

REQUESTED CLOSEOUT

Name the handoff package in the proposal.

- [ ] Final approved scope and zone schedule
- [ ] Completed-area and exception log
- [ ] Authorized-change log
- [ ] Supporting-record index
- [ ] Objective field observations
- [ ] Property-owned open decisions
- [ ] Separate specialist referrals when agreed
- [ ] Named delivery and review owner

SAMPLE LIMITATION

This is an illustrative planning example. It does not describe a real property, customer, contractor, inspection, price, schedule, result, certification, warranty, completed service or legal agreement. It cannot be signed or used to authorize work.

EXPERIENCE BEHIND THE STANDARD

12 years. More than 300 buildings maintained.
Our team's building-maintenance experience informs the questions in this standard.
These figures describe team experience that predates The Maintain Company.

BUILD A COMMERCIAL SCOPE BRIEF

See the closeout standard: maintaincompany.com/maintain-closeout-standard