# Scope of Work Template

Supports Step 1.2: Create a scope of work and public participation framework. This can be integrated into a request for proposals (RFP) or request for qualifications (RFQ) or used as an internal scope of work. Feel free to customize the template or use only some parts to fit your needs. **You will need to refer to your answers from the Scoping Exercise in Step 1.2 of the Playbook.** Also consider reviewing the guide [North Carolina Local Government Contracting: Quick Reference and Related Statues](https://www.sog.unc.edu/publications/books/north-carolina-local-government-contracting-quick-reference-and-related-statutes) by Norma Houston for additional guidance on contracting requirements.

## Introduction

This is a Scope of Work for [NAME OF COMMUNITY, GROUP, OR ORGANIZATION]’s resilience plan. This document describes the elements of the plan and informs the work plan guiding this project. The goal of this project and the plan is to address [INSERT RESPONSE(S) TO QUESTION 1 FROM SCOPING EXERCISE: Is your resilience planning effort focused on one specific climate related hazards or vulnerability or multiple hazards and vulnerabilities?].

*Here’s an example of what this might look like when you are finished:*

*This is a scope of work for the Town of Smithville Resilience Action and Implementation Plan. This document describes the elements of the plan and informs the work plan guiding this project. The goal of this project and the plan is to address our community’s vulnerability to climate-related hazards.*

## Plan Focus

[INSERT NAME OF COMMUNITY, GROUP, OR ORGANIZATION]’s resilience plan will focus on building resilience over a [INSERT RESPONSE TO QUESTION 6 FROM THE SCOPING EXERCISE: What is the timeframe for actions that your resilience planning effort will include? Over what period of time   
do you want to investigate projected climate changes?] timeframe for [INSERT RESPONSE TO QUESTION 2: What is the geography or spatial extent of your resilience planning effort? AND A BRIEF DESCRIPTION OF THE WHOLE PLANNING AREA].

The following climate hazards and vulnerabilities will be considered and addressed in this plan:

[INSERT A BRIEF DESCRIPTION OF THE SPECIFIC HAZARDS AND VULNERABILITIES TO BE ADDRESSED.   
IF YOU INTEND TO ADDRESS MULITIPLE HAZARDS AND VULNERABILITIES BUT ARE NOT SURE WHICH YOUR COMMUNITY MIGHT BE MOST IMPACTED BY OR YOU ARE SCOPING A BROAD-BASED RESILIENCE PLAN, INCLUDE A LONGER LIST OF CLIMATE-RELATED HAZARDS MOST LIKELY TO IMPACT NORTH CAROLINA COMMUNITIES.]

This planning effort focuses on building resilience by creating a [INSERT ANSWER TO QUESTION 5] plan focusing on [INSERT ANSWER TO QUESTION 6]. Specifically, [INSERT A BRIEF DESCRIPTION OF YOUR ANSWER TO QUESTION 3: What do you hope to achieve through your resilience planning effort?].

*Here’s an example of what this might look like when you are finished:*

*The Town of Smithville’s Resilience Action and Implementation Plan will focus on building resilience over a ten-year period and will investigate projected climate changes in the coming thirty years for the Town of Smithville. The town is a small, rural community with a population of 2,500.*

*The following climate hazards and vulnerabilities will be considered and addressed in this plan: increased intensity of precipitation and the town’s vulnerabilities to flooding and erosion; high heat and public health vulnerabilities; and drought and vulnerability to wildfires.*

*This planning effort focuses on building resilience by creating an exploratory plan focusing on actions the town can take within the next five years to address climate change impacts projected to occur over the next   
25 years. Specifically, by developing a consensus-based community resilience vision and goals and assessing the hazards and vulnerabilities most likely to impact our town, we will be able to select solutions to enhance our resilience.*

## Tasks

The following tasks will be completed to create [INSERT NAME OF COMMUNITY, GROUP, OR ORGANIZATION]’s resilience plans.

*Unless otherwise described, the tasks and subtasks below are more fully described in the North Carolina Resilient Communities Planning Guide Playbook. If other local plans, policies, or documents are important for context or for completing the work, include them here and provide a link. Delete project tasks, subtasks or deliverables that are not relevant to your project.*

*For each task, identify the following elements as relevant to your needs. Don’t forget to estimate resources needed for outreach and engagement activities.*

***Subtasks:*** *Each task’s individual elements or specific deliverables. Use the steps in the Playbook as a   
starting point.*

***Lead:*** *The individual responsible for managing and executing the successful completion of the task.*

***Support:*** *The staff or people needed to complete each task.*

***Level of Effort:*** *The estimated number of hours required for successful completion of the task.*

***Budget:*** *The estimated resources needed to complete the task, based on hours and personnel.*

## Task A: Process and participation

**Subtask A1**: Develop Public Participation Framework (Playbook Step 1.2).

**Subtask A2:** During Phase 1, lead the following engagement activities: [LIST ENGAGEMENT ACTIVITIES]

**Subtask A3:** During Phase 2, lead the following engagement activities: [LIST ENGAGEMENT ACTIVITIES]

**Deliverable(s):** [DESCRIBE DELIVERABLES] *Facilitate outreach and engagement as described in your Scope of Work and Public Participation Framework. Provide a brief narrative, supporting graphics, and images describing the planning process and outcomes of community outreach   
and engagement activities.*

**Lead:** [INSERT LEAD]

**Support:** [INSERT PEOPLE OR STAFF NEEDED TO COMPLETE TASK]

**Number of community engagement meetings, type** (steering committee or general community and in-person or hybrid), **and timing:** [INSERT NUMBER OF MEETINGS AND TYPE]

**Level of Effort:** [INSERT NUMBER OF HOURS TO COMPLETE TASK] hours

**Task Budget:** $[INSERT ESTIMATED BUDGET]

## Task B: Define your community’s resilience vision and goals. (*Playbook* Step 1.4)

**Subtask B1:** Develop a vision for your community resilience effort, using the Visioning and Goal Setting Exercise.

**Subtask B2:** Develop goals to support your vision, using the Visioning and Goal Setting Exercise.

**Subtask B3:** Conduct community engagement and steering committee meetings as outlined in the Public Participation Framework (Task A and Step 1.2).

**Subtask B4:** [INSERT ANY OTHER SUBTASKS NEEDED]

**Deliverable:** [DESCRIBE THE DELIVERABLES] A narrative, supported by graphics and/or data, of the resilience vision and goals, including a description of the desired future state of resilience and how it will be accomplished.

**Lead:** [INSERT LEAD]

**Support:** [INSERT PEOPLE OR STAFF NEEDED TO COMPLETE TASK]

**Number of community engagement meeting, type** (steering committee or general community and in-person or hybrid), **and timing:** [INSERT NUMBER OF MEETINGS AND TYPE]

**Level of Effort:** [INSERT NUMBER OF HOURS TO COMPLETE TASK] hours

**Task Budget:** $[INSERT ESTIMATED BUDGET]

## Task C: Vulnerability Assessment (*Playbook* Steps 2.1 – 2.3)

**Subtask C1:** Identify and map hazards of concern, including the following: Identify hazards and their key characteristics; Describe previous occurrences in the community, along with historic and potential future impacts; Determine the level of concern (high, medium, low) for the hazard for your community; Summarize this information in a Hazards of Concern Table (*Playbook* Step 2.1).

**Subtask C2:** Assess vulnerability, including the following: [INSERT ANY SPECIFICATIONS ABOUT DATA SOURCES AND QUANTITATIVE OR MAPPING ANALYSIS DESIRED] (*Playbook* Step 2.2).

**Subtask C3:** Conduct community engagement and steering committee meetings as outlined in the Public Participation Framework (Task A and *Playbook* Step 1.2)

**Subtask C4:** [INSERT ANY OTHER SUBTASKS NEEDED]

**Deliverable:** [DESCRIBE THE DELIVERABLES] A narrative and tables, maps and other graphics, providing a comprehensive understanding of vulnerability in the planning area.

**Lead:** [INSERT LEAD]

**Support:** [INSERT PEOPLE OR STAFF NEEDED TO COMPLETE THE TASK]

**Number of community engagement meeting, type** (steering committee or general community and in-person or hybrid), **and timing:** [INSERT NUMBER OF MEETINGS AND TYPE]

**Level of Effort:** [INSERT NUMBER OF HOURS TO COMPLETE TASK] hours

**Task Budget:** $[INSERT ESTIMATED BUDGET]

## Task D: Resilience Plan

**Subtask D1:** Develop a list of strategies that have been prioritized by the steering committee and through community engagement (*Playbook* Steps 3.1 and 3.2).

**Subtask D2:** Develop implementation pathways and metrics for each strategy. This information should include: the organization or department that will serve as the implementation lead for this strategy; who will provide implementation support; the implementation timeframe; estimated cost; other implementation resources; funding sources; and what success would look like for this strategy. In addition to being listed in written format, provide an implementation matrix that summaries each strategy and its implementation pathway (*Playbook* Step 3.3).

**Subtask D3:** Conduct community engagement and steering committee meetings as outlined in the Public Participation Framework (Task A and *Playbook* Steps 1.2 and 1.3).

**Subtask D4:** Assist staff in the adoption of the plan by attending city/town/county meetings necessary for adoption including planning board and town/city council or board of commissioners meetings.

**Deliverable:** Create a resilience plan that brings together and describes Task A: Process and participation; Task B: Identify and describe resilience vision and goals (*Playbook* Step 1.4); Task C: Vulnerability Assessment (*Playbook* Steps 2.1 – 2.3); and the subtasks of Task D: Resilience Plan. The outline for the plan should include the following components:

A. Cover page

B. Table of contents and acknowledgments

C. Executive summary

D. Introduction

E. Resilience vision and goals (*Playbook* Step 1.4)

F. Process and participation. *Describe the planning process and community outreach and engagement activities (Playbook Steps 1.1 and 1.2). Include photos of engagement events.*

G. Vulnerability assessment synthesis (*Playbook* Step 2.3). *Include full vulnerability assessment as   
an appendix.*

H. Resilience strategies (*Playbook* Steps 3.1 and 3.2)

I. Implementation

**Lead:** [INSERT LEAD]

**Support:** [INSERT PEOPLE OR STAFF NEEDED TO COMPLETE THE TASK]

**Number of community engagement meeting, type** (steering committee or general community and in-person   
or hybrid), **and timing:** [INSERT THE NUMBER OF MEETINGS AND TYPE]

**Level of Effort:** [INSERT NUMBER OF HOURS TO COMPLETE TASK] hours

**Task Budget:** $ [INSERT ESTIMATED BUDGET]

## Task E: Framework for Implementation

**Subtask E1:** Develop framework and task list necessary for plan promotion that outlines the community approach to sharing the plan internally with staff and externally with the public.

**Subtask E2:** Sort and provide list of strategies by responsible person/agency that can be shared at a larger staff meeting to review each department’s responsibilities for plan implementation. Include the Strategy Implementation (*Playbook* Step 3.3 Develop Implementation Pathway and Performance Tracking) Matrix for each strategy.

**Deliverable:** Materials described in Subtask E1 and E2 above that are necessary to implement the plan.

**Lead:** [INSERT LEAD]

**Support:** [INSERT PEOPLE OR STAFF NEEDED TO COMPLETE THE TASK]

**Number of community engagement meeting, type** (steering committee or general community and in-person or hybrid), **and timing:** [INSERT THE NUMBER OF MEETINGS AND TYPE]

**Level of Effort:** [INSERT NUMBER OF HOURS TO COMPLETE TASK] hours

**Task Budget:** $ [INSERT ESTIMATED BUDGET]

*Create a schedule based on the tasks above and the primary plan milestones to accompany your scope and help you stay on track. Modify the example   
below as needed to fit your specific plan.*

*This schedule begins at planning kick off as outlined in the scope of work. However, make sure you allow enough time in the planning process for advertising for, interviewing, and selecting a consultant (consistent with the practices typically for retention of a consultant in your community) to assist your community   
in the plan development process. Retaining a consultant may take eight to twelve weeks depending on the requirements of your community and who has   
to approve the contract. Also consider reviewing the guide* [*North Carolina Local Government Contracting: Quick Reference and Related Statues*](https://www.sog.unc.edu/publications/books/north-carolina-local-government-contracting-quick-reference-and-related-statutes) *by   
Norma Houston for additional guidance on contracting requirements.*

*The time to complete each task will vary for each project and community. Factor in staffing levels, availability of your consultant and turn-around time for producing materials and getting feedback from your steering committee and community at large. Relevant Playbook Steps and Exercises are noted in this table for ease of use. Remove them from your final version.*

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | [Year] Aug. | Sept. | Oct. | Nov. | Dec. | [Year] Jan. | Feb. | March | April | May | June | July | Aug. |
| Task A: Process  and participation |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Task B: Identify and describe resilience  vision and goals (*Playbook* Step 1.4) |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Task C: Vulnerability Assessment (*Playbook* Steps 2.1 – 2.3) |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Task D: Resilience Plan |  |  |  |  |  |  |  |  |  |  |  |  |  |
| Task E: Framework  for Implementation |  |  |  |  |  |  |  |  |  |  |  |  |  |
| [List other Tasks] |  |  |  |  |  |  |  |  |  |  |  |  |  |