

Scoping Meeting Report Template

Project Name:

Work Order Request No.: *(Provided by the CITY)*

Consultant Name:

Consultant Address:

Consultant Project Manager:

Date of Scoping Meeting:

Project Location / Address: *(Include Facility or Property Name and Address)*

City Department:

City Project Manager:

Communication Matrix: *(Provide contact information for primary and secondary representatives of the City, Consultant, and Sub-Consultants. Include name, title, email, and phone number for each.)*

PROJECT DETAILS:

1. PROJECT UNDERSTANDING *(Briefly describe the Project needs, goals, and background. Summarize the proposed approach and services to be provided by the CONSULTANT)*
2. SCOPE OF SERVICES *(Outline the specific professional services and tasks to be performed. Tasks may vary depending on project type. This section does not include the effort necessary to develop the detailed Scope of Services and Estimate of Probable Construction Cost.)*

Task 1 – Data Collection *(Ex: site visits, needs assessment, geotechnical/survey/traffic counts/etc)*

Task 2 - Project Management

Task 3 – Planning

Task 4 - Development of Project Deliverables (such as Design (30%/60%/90%/100%), Surveying and Mapping Documents, Estimate of Probable Construction Costs, technical studies, testing reports, modeling results, or other discipline-specific documentation)

Task 5 – Permitting Assistance *(if applicable)*

Task 6 – Procurement/Solicitation Assistance *(if applicable and requested by City)*

Task 7 - Construction Administration *(if applicable and requested by City)*

3. PROJECT SCHEDULE (*Provide anticipated completion dates for each Task and key milestone, consistent with the Project Schedule requirements in Section 2.15 of the Agreement and inclusive of all CITY and Outside Regulatory Agency review periods.*)
4. OPINION OF PROBABLE CONSTRUCTION COST (*If applicable, Provide the CONSULTANT's preliminary Opinion of Probable Construction Cost based on conceptual scope and assumptions available at the time of the Scoping Meeting. This value is intended for planning purposes only and is subject to refinement as project details develop.*)
5. SUBCONSULTANTS (*List all Sub-Consultants participating in the Project. Identify any Sub-Consultants not previously listed in Exhibit B and provide justification for their addition, consistent with Article 3.10 of the Agreement.*)
6. CITY FURNISHED DOCUMENTS & DATA (*Identify surveys, drawings, reports, or other materials to be provided by the CITY in accordance with Article 5 of the Agreement.*)
7. MEETINGS AND SITE VISITS – (*List the anticipated number and type of Project Meetings and Site Visits and identify the expected participants.*)
8. COMPENSATION (*Provide a detailed fee proposal by Task in accordance with the Labor Rates established in Exhibit E and the approved Method of Compensation (Hourly Not-to-Exceed, Lump Sum, or Milestone-Based). Include a summary of estimated hours, direct labor costs, and any Reimbursable Expenses authorized per Section 3.18.*)
9. SERVICES NOT INCLUDED – (*List any services excluded from the Scope of Services. Any additional services shall be performed only through a Supplemental Work Order as defined in Section 2.21*)
10. ADDITIONAL SERVICES - (*Identify any potential additional services that may be required based on project conditions, to be negotiated and authorized separately.*)
11. SPECIAL CONSIDERATIONS/NOTES/ASSUMPTIONS (*Provide comments, observations, or special considerations relevant to the Project. Note any assumptions used in preparing the proposal.*)
12. OTHER INFORMATION (*Include any other data, materials, or methods the CONSULTANT plans to utilize in connection with performing services under this Work Order.*)