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Scope of Work   
Template

# Purpose

This tool is a template scope of work for an engagement. To learn more, review the Scope of Work guide at [engagement-toolkit.phila.gov](http://www.phila.gov/engagement-toolkit).

# Instructions

Set aside 30 minutes to create your scope of work. Find a comfortable space to think and prepare to sit with questions about your engagement.

As you create your own scope of work, reference the example answer under each question below. Keep in mind that your scope of work is entirely dependent on your engagement. So, you may need to answer additional or different questions with your sponsor. For more questions to consider, review the Scope of Work guide at [engagement-toolkit.phila.gov](http://www.phila.gov/engagement-toolkit).

## Overview

What is the title of your engagement?

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| *Example: Designing Chinatown’s bike lanes* |

Who’s the practitioner in your engagement? Consider who’s planning, facilitating, and evaluating the work. Name individuals and their City agencies.

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| *Example: Liam Employee, from the Office of Transportation, Infrastructure, and Sustainability* |

Who’s the sponsor in your engagement? Consider who’s approving, delegating, and guiding the work. Name individuals and their City agencies.

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| *Example: Olivia Employee, from the Office of Transportation, Infrastructure, and Sustainability* |

Who else is involved in your engagement? Consider who’s advising, influencing, or supporting the work. Name individuals and their City agencies.

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| *Example: Mason Employee, from the Philadelphia City Planning Commission, and Ava Employee, from the Office of Transportation, Infrastructure, and Sustainability will both act as advisors* |

## Purpose

What’s the goal of this engagement? Consider the desired impact or result.

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| *Example: Our planner and traffic engineer have created three possible designs for protective bike lanes in Chinatown. The goal of this engagement is to identify the community’s preferred design to implement. Protective bike lanes keep pedestrians safe by adding distance from vehicles on our roadways.* |

What does success look like in this engagement? Consider how to measure success related to accomplishing goals and centering equity.

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| *Example: This engagement is about collecting input on the community’s preferred design for new protective bike lanes in Chinatown. Success looks like:*   * *Collecting 100 survey responses from community members who live and work in Chinatown.* * *Hosting two open houses to preview our three possible designs.* * *Releasing a report summarizing the notes from our open houses, results from our survey, and City government’s final decision on the design to implement.* |

What communities are most involved in this engagement? Consider a demographic or geographic focus. Also consider who’s most impacted by the work or who has relevant lived experience.

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| *Example: We intend to engage community members who live and work in Chinatown. We specifically want to engage those who may benefit from protective bike lanes. Meaning, bikers, community members using wheelchairs, and young families using strollers.* |

## Equity

How can you commit to centering equity in this engagement? Consider our definition of equitable community engagement below.

* Account for considerations, like racism, trauma, and trust.
* Center historically excluded and marginalized communities in decision making.
* Decrease digital, disability, and language access participation barriers.
* Embrace diversity and prioritize racial equity.
* Honor unique identities and lived experiences.
* Invest necessary funding, staff, and time.
* Share decision-making power between City government and communities.

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| *Example: To center equity in this engagement, we will:*   * *Account for considerations, like racism, trauma, and trust by working with local community leaders and trusted messengers in Chinatown to facilitate our open houses.* * *Decrease digital, disability, and language access participation barriers by translating our open house materials, survey, and report into simplified Chinese. We’ll also provide onsite interpretation during our open houses for those who speak Mandarin.* * *Honor unique identities and lived experiences by collecting at least 75% of our surveys from community members who live and work in Chinatown, since they’re most impacted by this decision.* |

## Level of engagement

Which level of engagement best describes this work? Consider the levels of engagement below.

* **Inform.** Engagements at this level work in one direction. The purpose is for City government to disseminate information to communities. City government doesn’t collect community input. Engagements at this level require the least resources.
* **Consult.** Engagements at this level work in two directions. The purpose is for City government to both disseminate information and collect community input. City government uses community input to inform decision making. Engagements at this level require moderate resources.
* **Collaborate.** Engagements at this level share decision-making power with communities. The purpose is for City government and communities to collaborate. City government invites communities into clearly defined decision making processes. Engagements at this level require considerable resources.
* **Community-owned.** Engagements at this level fully shift decision-making power to communities. The purpose is for City government to invest in communities to pursue their own interests and needs. Communities are the decision makers. Engagements at this level require the most resources.

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| *Example: This engagement occurs within the consult level of engagement.* |

## Power

What decisions can the community make in this engagement? Consider decisions like when and where the engagement occurs.

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| *Example: The community leaders and trusted messengers that we collaborate with will make decisions about:*   * *The dates, locations, and times of our open houses.* * *The methods we use to recruit community members to our open houses.* * *The methods we use to recruit community members to complete our survey.* |

What decisions can you make in this engagement? Consider decisions like providing access accommodations and setting engagement goals.

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| *Example: As the practitioner in this engagement, Liam will make decisions about:*   * *The community leaders and trusted messengers we collaborate with.* * *The content and format of our open houses.* * *The content and questions on our survey.* * *The content and results included in our report.* |

What decisions can your sponsor make in this engagement? Consider decisions like approving deliverables and delegating resources.

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| *Example: As the sponsor in this engagement, Olivia will make decisions about:*   * *The budget, staff, and time available for this engagement.* * *The bike lane design to implement, based on collected community input.* |

## Resources

What’s the budget for this engagement? Consider the total funding available, as well as funding set aside for specific costs.

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| *Example:* | | | | |
| **Expense** | **Description** | **Quantity**  *(# of items)* | **Cost / item**  *($ per item)* | **Expense total**  *(# of items x $ per item)* |
| Compensation | 3 collaborators will be compensated for 5 hours of work facilitating open houses and recruiting community members. | 3 collaborators | $200 per collaborator | $600 |
| Live interpretation | 2 interpreters will be needed for 2 open houses that each last 2 hours | 4 interpreters | $100 per interpreter | $400 |
| Print translation | Translating 1 one-page pamphlet and 1 fifteen-slide presentation for the open house; translating 1 two-page survey, translating 1 ten-page report | Approximately 5,000 words | $0.20 per word | $1,000 |
|  |  | **Engagement total**  *(sum of expense totals)* | | **$2,000** |

What’s the staff capacity for this engagement? Consider who’s best equipped to lead and support the work. Track the number of hours each staff person is working on the engagement to ensure that everyone maintains an appropriate workload. That can also help plan staff capacity for future engagements.

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| *Example: The staff capacity for this engagement includes:*   * *Manager: Olivia, as the sponsor and supervisor of Liam.* * *Owner: Liam, as the practitioner. Lead on planning, facilitating, and evaluating the open houses, survey, and report.* * *Consultant: Three community leaders / trusted messengers.* * *Helper: Ava and Mason, as technical advisors on the bike lane designs. Support on planning, facilitating, and evaluating the open houses.* * *Approver: Olivia, as the sponsor. Approve the survey, make the final decision, and approve the report.* |

What’s the timeline for this engagement? Consider the time needed to plan, facilitate, and evaluate the work. Also consider any important deadlines.

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| *Example: The total timeline for this engagement is 14 weeks. That includes:*   * *Planning: Four weeks*   + *Building relationships and confirming collaborations with three community leaders and trusted messengers.*   + *Confirming interpreters for both open houses.*   + *Developing and translating the open house materials and survey.* * *Facilitating: Six weeks*   + *Recruiting community members to complete the survey.*   + *Recruiting community members to attend the open houses.*   + *Hosting both open houses.* * *Finalizing: Two weeks*   + *Analyzing survey results to identify community preferences.*   + *Deciding the bike lane design to implement, based on collected community input.*   + *Developing and translating the report to communicate City government’s decision.* * *Evaluating: Two weeks*   + *Assessing success accomplishing goals and centering equity.*   + *Analyzing community feedback forms from the open houses.*   + *Hosing team debriefs with advisors, practitioners, and sponsors.*   + *Hosting team debriefs with community leaders and trusted messengers.*   + *Reserving time for independent reflection.* |

## Agreement

By signing this scope of work, we agree to the approach and purpose outlined for this engagement. We also agree to update this scope of work as needed, due to emergent community interests and needs.

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| Practitioner |  | Date |

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| Sponsor |  | Date |