**Scope of Work Checklist**

The Scope of Work (SOW) is the official description of the work that is to be completed during the contract. Tasks 1-6 outlined in the SOW are for illustrative purposes only. **Applications with missing components will be at a competitive disadvantage.** Please use this checklist to make sure your Scope of Work is complete.

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| --- | --- |
| **Scope of Work Checklist** | |
| **(✓)** | **Ensure these items are completed prior to submitting to Caltrans** |
|  | Use the Fiscal Year 2026-27 template provided |
|  | Include the activities discussed in the grant application |
|  | List all tasks using the same title as stated in the Cost & Schedule |
|  | Include task numbers in accurate and proper sequencing, consistent with the Cost & Schedule |
|  | Exclude sub-task numbers; only include sub-headings |
|  | Exclude tasks for project management and/or staff/consultant coordination; these activities should be spread among relevant tasks |
|  | Include athoroughIntroduction to describe relevant background, related planning efforts, the project and project area demographics, including a description of the under-resourced community involved with the project, if applicable |
|  | Include a thorough and accurate narrative description of each task |
|  | Task A is a required task. It must be titled “Project Administration” and cannot exceed 5% of the grant award amount (grant award and local match). Only the grantee and sub-recipient(s) can charge against Task A. Task A must only include the following activities and deliverables:   * + Caltrans and grantee Project kick-off meeting at the start of the grant   + Invoicing and quarterly reporting to Caltrans * DBE Reporting (federal grants only) |
|  | Include Task B for the procurement of a consultant (if needed). Only the grantee and sub-recipient(s) can charge against Task B. |
|  | Include detailed public participation and services to diverse communities in the Public Outreach Task (excluding technical projects) |
|  | Identify public outreach strategies in a manner that provides flexibility and allows for a diverse range of outreach methods (both in-person and virtual), excluding technical projects |
|  | Include a Task(s) for a Draft and Final product. The draft plan must include an opportunity for the public to provide feedback (excluding technical projects). |
|  | Include a summary of next steps your agency will take towards implementing the project in the Final Product |
|  | List achievable project deliverables for each Task |
|  | EXCLUDE environmental, complex design, engineering work, and other ineligible activities outlined in the Grant Application Guide |

**SCOPE OF WORK**

|  |  |
| --- | --- |
| **Project Information** | |
| **Grant Category** |  |
| **Grant Fiscal Year** | **FY 2026-27** |
| **Project Title** |  |
| **Organization** (Legal name) |  |

**Disclaimer**Agency commits to the Scope of Work below. Any changes will need to be approved by Caltrans prior to initiating any Scope of Work change or amendment.

**Introduction**

[Provide a detailed summary of the grant project. Include athoroughIntroduction to describe relevant background, related planning efforts, the project and project area demographics, including a description of the under-resourced community involved with the project, if applicable.]

**Project Stakeholders**

[Provide a detailed summary of who the Project Stakeholders are. Will a consultant be working on the project? If so, what activities/tasks will they be involved with?]

**Overall Project Objectives**

[Provide a detailed summary of the Overall Project Objectives.]

**Summary of Project Tasks**

[Project management activities must be identified within the task(s) the project management activities occur. A standalone project management task is not allowed.]

**Task A: Project Administration**

This is an Administrative Task that shall only be charged against by the Grantee for the Administration of this grant project. Budget for this task (grant award and local match) cannot exceed 5% of the grant award amount.

Grantee will manage and administer the grant project according to the Grant Application Guidelines, Regional Planning Handbook, and the executed grant contract between Caltrans and the grantee.

[Provide a detailed narrative of activities to be completed in this Task]

|  |
| --- |
| **Task Deliverables** |
| [The following are the only allowable deliverables for this Task. This Task is not for the management of the consultant or meetings between the grantee and the consultant] |
| Kick-off meeting with Caltrans - Meeting Notes, quarterly invoices and progress reports, DBE reporting (federal Grants only). |

**Task B: Consultant Procurement**

[Provide a detailed narrative of activities to be completed in this Task]

Grantee will procure a consultant, consistent with state and federal requirements, Local Assistance Procedures Manual for procuring non-Architectural and Engineering consultants, the Grant Application Guide, Regional Planning Handbook, and the executed grant contract between Caltrans and the grantee.

|  |
| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Grantee’s current procurement procedures, copy of the Request for Proposal/Qualifications, copy of the contract between consultant and grantee, copies of all amendments to the consultant contract, meeting notes from project kick-off with consultant |

**Task 1: Existing Conditions**

[Provide a detailed narrative of activities to be completed in this Task]

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| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Summary of Existing Conditions |

**Task 2: Analysis**

[Provide a detailed narrative of activities to be completed in this Task]

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| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Summary of Analysis |

**Task 3: Public Outreach**

[Provide a detailed narrative of activities to be completed in this Task]

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| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: PowerPoint Presentations, flyers, website announcements, sign-in sheets, community surveys, conceptual drawings, bilingual services, receipts for light snacks (Caltrans approval required prior to purchase. No full meals.) |

**Task 4: Advisory Committee Meetings**

[Provide a detailed narrative of activities to be completed in this Task]

|  |
| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Agendas, meeting notes, list of attendees, list of action items |

**Task 5: Draft and Final Plan**

[Provide a detailed narrative of activities to be completed in this Task]

|  |
| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Draft Plan, Public Review – list of comments, Final Plan that includes a summary of next steps towards implementation, credits FHWA, FTA, and/or Caltrans on the cover or title page, submitted to Caltrans in an ADA accessible electronic copy. |

**Task 6: Board Review/Approval**

[Provide a detailed narrative of activities to be completed in this Task]

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| --- |
| **Task Deliverables** |
| [List achievable deliverables for this Task] |
| Examples: Board Agenda, presentation materials, meeting minutes with board acceptance/approval. |