

# Scope of Services Samples

## Contents

- Introduction
- Scope Form Templates (Hardcopy Prints are included in this appendix)
- Scopes for Specific Tasks (Prints are not included in this appendix)
- Scopes by Project Types (Prints are not included in this appendix)

*Note: All Scope samples & templates are provided in MS Word format*



## Introduction

This appendix is an archive of Scopes of Services electronic files obtained from prior consultant agreements used to perform services for RCTD. These scopes are provided as samples and/or starting points to facilitate the preparation of contract scopes of services. It is common to use consultants for similar types of work and therefor common to use similar scopes. The scopes are provided in this appendix in three groups.

### *Scope Form Templates*

These templates are simple word templates preformatted for use to prepare a scope of service. Hardcopy printouts of these samples are included in this appendix. The remaining scope samples are provided as electronic templates only and hardcopy printouts are not included in this appendix.

### *Scopes for Specific Tasks*

These templates provide scopes for specific tasks. Some of the samples provided include:

- Geotechnical
- Landscaping
- Public Outreach
- Utility Coordination

### *Scopes by Project Types*

These templates include samples that provide significant services that involve multiple tasks. Some of the types of contract samples provided in this category include:

- Bridge Replacement
- Construction Management
- Railroad Grade Separations
- Interchange Replacement
- Roadway Extension
- Roadway Realignment
- Roadway Widening



**APPENDIX A • SCOPE OF SERVICES**

**TABLE OF CONTENTS**

**APPENDIX A • ARTICLE AI • INTRODUCTION ..... 1**

- A. Description ..... 1
- B. Coordination..... 1
- C. Standards ..... 1
- D. Key Personnel ..... 1

**ARTICLE AII • PROJECT ADMINISTRATION ..... 1**

- A. Project Management..... 1
- B. Cost Accounting..... 1
- C. Scheduling ..... 2

**ARTICLE AIII • SCOPE OF WORK ..... 2**

- A. < TASK 1 > ..... 2
- B. < TASK 2 > ..... 2

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**APPENDIX A • ARTICLE AI • INTRODUCTION**

**A. DESCRIPTION**

Services provided under this contract will be performed on an on-call basis to the Riverside County Transportation Department for transportation related WORK ASSIGNMENTS located throughout Riverside County. ENGINEER will provide technical, administrative, managerial and other types of services in support of day-to-day operations of COUNTY staff.

**B. COORDINATION**

ENGINEER may be required to coordinate with other involved agencies. Coordination may include, but will not necessarily be limited to the following:

- Relevant Cities
- CALTRANS
- Regional Water Quality Control Board
- Federal Highway Administration
- Federal and State Resource Agencies
- Utility Companies

All meetings with outside agencies will be scheduled by ENGINEER with approval of COUNTY.

**C. STANDARDS**

Standards will be determined on an assignment by assignment basis.

**D. KEY PERSONNEL**

The ENGINEER has represented to the COUNTY that certain key personnel will perform the services and if one or more of such personnel should become unavailable, ENGINEER may substitute other personnel of at least equal competence only after prior written approval by the COUNTY CONTRACT MANAGER has been secured. The key personnel for performance on this contract are:

<b>Name</b>	<b>Position</b>
< Name >	< Position >

**ARTICLE AII • PROJECT ADMINISTRATION**

**A. PROJECT MANAGEMENT**

1. The ENGINEERING CONTRACT MANAGER will maintain ongoing liaison with the COUNTY CONTRACT MANAGER and other effected agencies to promote effective coordination during the course of working on assignment.

**B. COST ACCOUNTING**

1. The ENGINEER will prepare monthly reports of expenditures for each on-call assignment. Expenditures

1 include direct labor costs, other direct costs and subconsultant costs. These reports will be included as  
2 supporting data for invoices presented to the COUNTY every month.

3 **C. SCHEDULING**

- 4 1. Schedules will be prepared for each specific assignment.

5 **ARTICLE AIII • SCOPE OF WORK**

6 The scope of work for this contract is to provide on-call services to the Riverside County Transportation  
7 Department for transportation related WORK ASSIGNMENTS located throughout Riverside County. Services will  
8 be performed at the request of the COUNTY CONTRACT MANAGER. ENGINEER and/or COUNTY shall  
9 prepare a written scope of work and schedule for each WORK ASSIGNMENT. ENGINEER and COUNTY shall  
10 negotiate and establish a budget that is consistent with the scope of work and the ENGINEER's billing rates as  
11 provided in Appendix C. Each WORK ASSIGNMENT shall be memorialized in writing and approved by the  
12 Director of Transportation and by the ENGINEERING CONTRACT MANAGER or authorized designee's. The  
13 yearly sum of the authorized budget for ENGINEER's WORK ASSIGNMENTS shall not exceed the maximum  
14 annual amount as defined in Appendix C.

15 < General description of services to be provided >

16 **A. < TASK 1 >**

17 < Description/details of Task 1 >

18 **B. < TASK 2 >**

19 < Description/details of Task 2 >

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**APPENDIX A • SCOPE OF SERVICES**

**TABLE OF CONTENTS**

A. PROJECT Description ..... 1

B. Location ..... 1

C. Coordination ..... 1

D. Phases ..... 1

E. Standards ..... 1

F. Key Personnel ..... 1

**ARTICLE AII • SERVICES TO BE PROVIDED ..... 1**

A. Contract Deliverables ..... 1

B. Phase I Services ..... 1

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**APPENDIX A • ARTICLE AI • INTRODUCTION**

**A. PROJECT DESCRIPTION**

< description >

**B. LOCATION**

< written description or vicinity map>

**C. COORDINATION**

ENGINEER shall coordinate with other involved agencies for compatible design and phasing of construction with existing conditions. Coordination may include, but will not necessarily be limited to the following:

- < list of agencies proposed for coordination >

All meetings with other outside agencies will be scheduled by ENGINEER with approval of COUNTY.

**D. PHASES**

The services performed by ENGINEER will be accomplished in < # > Phases:

< list of phases this contract is broken down into >

Phases I will proceed upon written notice to proceed. The remaining phases will not proceed until authorized in writing by COUNTY.

**E. STANDARDS**

< identify standards to be used for the contract >

All Documents shall be prepared using English standards and dimensions.

**F. KEY PERSONNEL**

The ENGINEER has represented to the COUNTY that certain key personnel will perform the services and if one or more of such personnel should become unavailable, ENGINEER may substitute other personnel of at least equal competence only after prior written approval by the COUNTY PROJECT MANAGER has been secured. The key personnel for performance of this PROJECT are:

< list of key personnel >

**ARTICLE AII • SERVICES TO BE PROVIDED**

**A. CONTRACT DELIVERABLES**

< provide a list of all contract deliverables along with the task and phase the deliverable is associated with >

**B. PHASE I SERVICES**

< provide the scope of services here >

**AMENDMENT 1 • APPENDIX A1 • ADDITIONAL SERVICES**

**TABLE OF CONTENTS**

**ARTICLE A1 • INTRODUCTION..... 1**

A. SECTION TITLE ..... 1

    1.00 Sample Table ..... 1

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AMENDMENT 1 • APPENDIX A1 • SCOPE FOR ADDITIONAL ? SERVICES

ARTICLE AI • INTRODUCTION

A. SECTION TITLE

Text

1.00 Sample Table

	Original Budget:	Add Proposed:	% Increase:	Total at Completion:
<b>COMPANY 1</b>	<b>\$100,000</b>	<b>\$50,000</b>	<b>50%</b>	<b>\$150,000</b>
<b>COMPANY 2</b>	<b>\$100,000</b>	<b>\$50,000</b>	<b>50%</b>	<b>\$150,000</b>
<b>TOTAL</b>	<b>\$200,000</b>	<b>\$100,000</b>	<b>50%</b>	<b>\$300,000</b>
Company 1, Company 2 Text				

Text

**Deliverable:** • *Title of Deliverable*