

Connect SoCal 2050 Community Partner Program – Scope of Work Template

The primary goal of this program is to formally engage community-based organizations (CBOs) as part of the Connect SoCal 2050 Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS) development process. Organizations will work with SCAG and the consultant team (Kearns & West (K&W)) to provide feedback during the Connect SoCal development process and engage local stakeholders to inform them about Connect SoCal and solicit feedback. This engagement will rely on the expertise and insights of local partners to help ground-truth assumptions, strategies, and policies in the community.

The form below outlines the proposed tasks and responsibilities of the CBO applicant. This scope of work template was filled out using information provided in the online Application form. The CBO applicant is required to review this scope of work and provide feedback and/or requested changes. The final scope of work must be submitted to SCAG by Jan. 20, 2027, for consideration. K&W is available to discuss the scope as needed. Once selected, K&W and SCAG will use the information in this form to develop an agreement between the consultant team and CBO partner.

Community Partner Information

Contact Name:	Contact Email:
Contact Phone:	Organization Name:
Organization Address:	Website:
City/Community(ies) of Focus:	County:
Are you a non-profit organization?	Do you have a fiscal sponsor? If so, please share the name of your fiscal sponsor:

If so, what type (e.g., 501(c)(3))? (List relevant Internal Revenue Code section):	Have you worked with SCAG before?
Brief Organization Description: <i>include a short description of the organization's mission and goals and history serving the geographic area(s) noted.</i>	
Target Populations: ☐ Children and Youth ☐ Low-income Communities of Color ☐ Older Adults or Retired Persons ☐ Veterans ☐ Individuals with Access and Functional Needs ☐ Women and Female-Headed Households ☐ Formerly Incarcerated Individuals ☐ Populations with Limited English Proficiency ☐ Other (please specify): _____	Policy Areas: ☐ Mobility and Transportation Access ☐ Community Development and Housing ☐ Economic Development ☐ Environment and Climate Resiliency ☐ Other (please specify): _____

Proposed Scope of Work

Activity (Identify activities based on the checklist below. If the activity is not on the checklist, we will need to get approval from SCAG)	Proposed Date(s) (Activity 1 – 9 to be completed by 4/1/27 with an exception for Activity 4 to be completed by 6/1/2027)	City/Community
1. ex. Activity 1. Onboarding and Training		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
Proposed Scope of Engagement: <i>Please provide a summary of how the Community Partner will work with the consultant team to increase engagement and inform the Connect SoCal development process. You can use the checklist below to see information on specific tasks. (Max. 250 words)</i>		

Compensation Structure and Activity Description

COMPENSATION STRUCTURE

IMPORTANT: Compensation is based on Activity completion. Each Activity is associated with a specific compensation amount based on the activities selected by the Community Partner. Eligible direct costs, such as printing, interpretation, or other costs specifically identified in the activity descriptions, may be reimbursed in addition to activity compensation. For eligible direct costs, Partners must submit receipts or other required documentation with their invoice.

Partners must submit supporting documentation verifying completion of the applicable deliverables.

For a CBO to mark an activity as “Complete,” the following steps must be completed:

- Upload all required documentation to the designated activity folder.
- Notify K&W staff by email at baviles@kearnswest.com once all required materials have been uploaded.
- Allow one week for review. The project team will review the submitted materials during this period and notify the CBO if any additional documentation or revisions are needed.
- Mark the activity as “Complete” once the one-week review period has passed and no additional materials are requested.

The project team will provide a standardized invoice template and instructions for submitting invoices and supporting documentation. This cycle will offer the option to receive compensation in two installments. CBOs may submit their first invoice as early as the completion of Activity 3. The second payment will be distributed upon completion of the remaining activities identified in the CBO’s scope of work.

Upon submission of an invoice, CBOs will receive payment within 30 days, subject to verification of the completed activities.

CBOs are not required to submit two invoices. They may instead submit a single invoice upon completion of all activities in their scope of work and receive payment at that time.

Payment will be processed and issued following review and confirmation of deliverable completion and eligible direct costs.

The total maximum compensation available to each Partner will be based on the activities selected in their Scope of Work and any eligible direct costs approved for reimbursement.

ACTIVITY DESCRIPTION

Mandatory Activities

Activity 1. Onboarding and Training (Mandatory): Participate in onboarding and training. Up to 2 staff members may participate. Compensation is \$250 per attendee, up to two attendees.

- Deliverables: Training attendance and sign-in confirmation.

Activity 2: Close Out Meeting Participation (Mandatory): Participate in one close-out meeting. Up to 2 staff members may participate. Compensation is **\$250** per staff.

- Deliverables: Close out meeting attendance and sign-in confirmation.

Review of Materials

Activity 3. Review Draft Materials: Review draft materials and submit feedback/comments before materials are finalized. Compensation is **\$500** for 4 hours.

- Deliverables: 1) Review draft materials with track changes/comments. 2) Written feedback to the project team with a summary of suggested edits and recommended changes.

At the discretion of the project team and as needed, provide additional context, language recommendations, and cultural competency guidance to support the development of geographically focused materials.

Promotion of Connect SoCal Activities

Activity 4. Direct Engagement

a) Conduct direct outreach to constituents using digital media, such as emails, newsletters, or other digital communications. Compensation is **\$500**.

And/or

b) Promote workshops or digital survey opportunities and in-person engagement (e.g. flyering, canvassing) including feedback documentation and signing up community members to a project newsletter. Compensation is **\$500**. Activity 4b includes up to **\$500** for *printing*.

- Deliverables: 1) Social media and/or newsletter reports (including number of participants reached); or, 2) Call logs; 3) Screenshots or pictures of social media posts; 4) Meeting sign-ins, notes, or pictures for in-person engagements.

CBO-Lead Engagement Activities

Activity 5. Workshops

a) Virtual Workshop: Lead and host **virtual workshops** and gather feedback from participants/groups via workshop activities and digital polling. Compensation is **\$1,000** per workshop. Activity 5a includes up to **\$1,000** for *interpretation and incentives*.

And/or

b) In-person Workshop: Lead and host **in-person workshops** and gather feedback from participants/groups. Compensation is **\$2,500** per workshop. Activity 5b includes up to **\$1,250** for *printing, interpretation services, food, and incentives*; and up to **\$250** for *light refreshments*.

- Deliverables: 1) Outreach target list; 2) Meeting presentation and/or facilitation notes; 3) Follow-up materials; 4) Attendance / list of participants; 5) feedback summary document*; 6) Photos of events

Activity 6. Focus Groups

a) Virtual Focus Group: Lead and host **virtual focus groups** and gather feedback from participants. Compensation is **\$1,250** per focus group. Activity 6a includes up to **\$1,250** for *printing, interpretation services, and incentives*.

And/or

b) In-person Focus Group: Lead and host **in-person focus groups** and gather feedback from participants. Compensation is **\$2,000** per focus group. Activity 6b includes up to **\$1,500** for *printing, interpretation services, and incentives*; and up to **\$250** for *light refreshments*.

- Deliverables: 1) Outreach target list; 2) Meeting presentation and/or facilitation notes; 3) Follow-up materials; 4) Attendance/List of participants; 5) Feedback summary document*; 6) Photos of events

Activity 7. Community-Led Creative Expression: CBOs may develop and facilitate a creative activity that engages community members in expressing their perspectives, experiences, and visions related to Connect SoCal 2050 topics. The creative activity should draw to the CBO's knowledge of and relationships with the community and may include approaches such as community art projects, drawings, photography, storytelling, murals, exhibits, or other creative formats. For example, a CBO could invite community members to respond to a prompt such as, "Draw your community in 2025."

Compensation is **\$500-\$4,000** with the amount determined by approval of the proposed activity.

CBOs will submit a brief description of the proposed activity for review prior to implementation. The description should identify the intended audience, proposed approach, and how the activity will engage community members. SCAG will review the proposed activity to confirm that it aligns with the objectives of Connect SoCal 2050. The creative direction, content, and community input will remain the responsibility of the CBO and participating community members. Final compensation will be determined based on the proposed activity and level of effort.

- Deliverables: 1) A brief description of the proposed creative activity and its connection to SCAG topics; 2) At least one completed creative product or creative activation; 3) Documentation demonstrating completion and/or public dissemination of the activity; and 4) A brief summary of audience engagement, reach, or outcomes, as applicable.

Activity 8. CBO-Hosted Pop-up Events: Lead and host **up to two additional pop-up events** using the provided toolkit of materials for data collection. Compensation is **\$1,500** per pop-up event.

- Deliverables: 1) Photos of pop-up booth; 2) Sign-in sheet or tally of engagements; 3) Feedback summary document

CBO Staff Support for SCAG Led Activities

Activity 9. SCAG Pop-up Event Support: Provide staffing support for direct outreach and data collection at SCAG-hosted pop-up events. Up to 2 events; up to 4 staff per event with preference for multilingual speakers but not required. Compensation is **\$350** per staff for a minimum of 2 hours and a max of 4 hours per event.

At the discretion of project team for as needed additional support.

- Deliverables: 1) Check-in / training meeting with project team before pop-up 2) Pop-up attendance

Eligible Direct Costs (check all that apply, provide estimated budgets, and budget assumptions)

The following lists eligible direct costs that must be included in your invoice, if applicable. Organizations may be reimbursed up to the amount described for each Activity. Any other direct costs not identified in the table, must be approved by the SCAG project manager.

- ☐ **Food** – *snacks and light refreshments only* (receipts required)

Anticipated Cost: \$_____

Notes & Assumptions: _____

- ☐ **Translation** (receipts required)

Anticipated Cost: \$_____

Notes & Assumptions: _____

☐ **Facility Rental/Lease/Fee** (receipts required)

Anticipated Cost: \$_____

Notes & Assumptions: _____

Eligible Direct Costs (cont.) (check all that apply, provide estimated budgets, and budget assumptions)

☐ **Equipment Rentals** (receipts required)

Anticipated Cost: \$_____

Notes & Assumptions: _____

☐ **Other Direct Costs** (describe expenditure): _____

Proposed Documentation (e.g., receipts): _____

Anticipated Cost: \$_____

Notes & Assumptions: _____

Ineligible Direct Costs

- Decorations
- Participant payments: Compensation for participation is not allowed; participation must be voluntary
- Unreasonable incentives, such as prizes for public participation
- Full meals
- Childcare: Unfortunately, childcare costs cannot be reimbursed due to direction from Caltrans, who is funding this project through SB 1. See the [Caltrans' Sustainable Transportation Planning Grant Program guidelines](#) to learn of other ineligible costs

Roles and Responsibilities

Consultant Team

- Work with Community Partner staff to develop a scope of work, determine compensation structure, and required deliverables.
- Provide training related to the Connect SoCal development process
- Serve as the primary liaison between the Community Partner and SCAG staff
- Communicate SCAG questions, requests, and requirements in a timely manner
- Coordinate with Community Partner ahead of events and/or engagements to communicate expectations, address questions or concerns, and surface any potential issues
- Share background information and supporting materials to Community Partner ahead of engagements and coordinate with Community Partner staff to obtain supporting documentation
- Process invoices and payment to Community Partners
- Work with Community Partner to resolve issues, provide options to address Community Partner or SCAG concerns, and identify options to amend scope or terminate agreements if necessary

Community Partner

- Work with SCAG and the Consultant Team to undergo training and inform community partner staff and/or members about the Connect SoCal development process
- Select applicable tasks, propose a work plan, and coordinate with the Consultant Team to complete tasks and complete deliverables
- Coordinate with partners, members, allies, and/or key constituencies to raise awareness about the Connect SoCal development process
- Identify opportunities to engage stakeholders and constituencies that can provide feedback on the Connect SoCal development process
- Be available to check in with the Consultant Team and share updates on activity progress, challenges, and opportunities
- Adhere to reporting requirements
- If applicable, identify opportunities to engage additional Community Partners as part of the Connect SoCal development process