



Appendix B
Project Scope of Work Template
March 2026, v1

Scope of Work Template

A. General Information

The Chester County Open Space Accelerator Program offers a quick, cost-effective, implementation-focused planning process for preparing an Open Space Action Plan. These plans activate priorities from local comprehensive plans, as well as open space, recreation, and environmental resource plans, along with other publicly vetted documents, through a streamlined process and ongoing support.

The following scope of work template provides the planning phases to assess key municipal open space priorities and develop concrete actions to implement priority projects in the immediate term. It further provides a breakdown of each project task, expected deliverables, and anticipated schedule.

1. Establish the Project Advisory Committee
2. Review and summarize existing conditions, planning and regulatory framework, and organizational capacity relevant to the implementation project
3. Hold an open space-centered community event (led by the municipality)
4. Develop the Open Space Action Plan for implementing the project
5. Plan acceptance or adoption by the governing body
6. Ongoing implementation guidance and support from Chester County Planning Commission (CCPC) for one year

Section 3.2 of the Open Space Accelerator Grant Guidelines outlines examples of eligible open space-related projects that can be explored and defined through this program. Some municipalities may have a clear understanding of the open space priority projects they want to advance through this program, while others may use this process to identify their priority projects.

The CCPC will assign a prequalified consultant to the project following grant award, based on the consultant's qualifications and availability. The CCPC Grant Administrator, along with the assigned consultant, will work with the Grantee to customize this project scope template to effectively address the project, community needs, and grant program requirements during the contract development phase. More details about contract development can be found in the Grant Guidelines, Section 7.0 Awarded Project – Contractual Requirements.

B. Project Phases

Note: The following items can be emphasized/de-emphasized or omitted based on the municipality's stated interests.

1. Project Initiation

- a. Project Advisory Committee

- i. Form committee
 - ii. Provide scope of work, general schedule, roles, and responsibilities via email
- b. Data collection and assessment
- c. Preliminary review of existing planning documents to identify open space related strategies and priorities
- d. **Meeting:** Project Kick-off meeting with municipal representative(s), assigned consultant, County Grant Administrator, Advisory Committee representative(s)
- i. Confirm or modify scope, schedule, milestones, and deliverables
 - ii. Discuss roles and responsibilities
 - iii. Discuss grant requirements
 - iv. Discuss implementation challenges and opportunities
 - v. Discuss municipality's open space needs and interests
- e. **Deliverables:**
- i. Kick-off meeting summary
 - ii. Scope amendment, if necessary

2. Open Space Assessment

The consultant shall conduct a targeted review of existing conditions, adopted plans, ordinances, mapping, and administrative capacity using publicly available and municipal-provided information relevant to the selected open space implementation project.

The purpose is to identify how the selected project aligns with adopted goals, objectives, and strategies, what policy and regulatory tools support implementation, and what local and regional contextual factors may influence the action plan.

Not all documents or conditions will be equally relevant. The review shall focus on materials that directly inform the implementation project. These may include:

- a. **Planning Framework** (i.e. comprehensive plan / open space, environmental, and recreation plan)
 - i. Identify land use, open space, recreation, natural resources, sustainability, resilience, or climate adaptation goals, objectives, and strategies that the selected project is intended to advance.
 - ii. Describe how the project advances those priorities within the municipality's broader open space, recreation, greenway, and conservation framework.
 - iii. Document implementation status and any inconsistencies, gaps, or outdated recommendations that may affect implementation.
 - iv. Briefly describe demographic, development, or land use trends identified in existing plans that affect the implementation of the project.
 - v. Conduct a desktop-level assessment and mapping of the project area's environmental and natural resources features based on available data sources.
- b. **Regulatory Framework** (i.e. zoning ordinance, subdivision and land development ordinance, official map)
 - i. Identify relevant zoning provisions, natural resource protection standards, and adopted mapping (official map, zoning maps, open space prioritization map)
 - ii. Assess whether existing standards and maps align with project objectives or require refinement, and whether changes should be addressed in the action plan phase or future planning.

c. **Administrative Capacity**

- i. Assess the municipal staff, board/committee, and volunteer capacity, as well as the expertise required to implement the project.
- ii. Identify local open space and conservation funding sources
- iii. Identify existing partnerships that may influence the feasibility of implementation.
- iv. Document administrative strengths and gaps that may affect project implementation.

Deliverable: Open Space Assessment Summary that highlights the results of this task and establishes the foundation for the implementation action plan.

3. Community Outreach

a. **Project Advisory Committee**

The Municipality will establish a Project Advisory Committee to provide guidance at important phases in the planning process, help identify priority issues, goals, and alternative strategies, and provide feedback on draft deliverables. If requested, CCPC will work with the municipality to identify members representing municipal staff, the Open Space Review Board, the Parks and Recreation Commission, the Planning Commission, and other stakeholders and community representatives. At least one municipal staff member and one elected official are recommended to participate in Advisory Committee meetings.

i. **Advisory Committee Meetings**

The consultant will facilitate three (3) Advisory Committee meetings. Additional meetings are not anticipated, but if the project team determines that they are beneficial and necessary to complete the project, then said meeting(s) shall be identified in the scope of work as agreed upon in the grant contract. Meetings shall be independent of regularly scheduled municipal meetings to provide a full opportunity to discuss the project and may occur in person or virtually. The consultant will provide the Committee with meeting materials approximately one week before this meeting.

- **Meeting 1: Open Space Assessment and Draft Implementation Strategies.** Using the Open Space Assessment, confirm alignment with adopted plans and policies, and identify and refine draft implementation strategies.
- **Meeting 2: Action Item Selection and Prioritization.** Review the draft implementation action items, evaluate feasibility and alignment with municipal capacity and policy direction, and select the preferred actions to advance into the formal implementation plan.
- **Meeting 3: Draft Action Plan Review.** Review the draft Open Space Action Plan and refine the recommended actions, schedule, responsibilities, and supporting strategies.

ii. **Deliverables:** Meeting agenda, materials, and summaries

a. **Community Event**

Municipal staff and volunteers plan and execute the event with consultant guidance. Consultant prepares exhibits as needed for input- 12 hours.

The municipality will plan a community outreach event focused on open space, to be held after the open space assessment. The purpose of the event is to generate

awareness of the Open Space Action Plan, gather input for the implementation project, and cultivate public excitement for the project and open space goals.

The municipality will organize the event, including securing the location, advertising and promoting it, and gathering community input and feedback. This outreach could either be at an existing well-attended community event or a new event specific to this project. Examples include: a community event in a park or open space, an outdoor education event, a farm tour/farm day.

The consultant will support the event by providing maps, exhibits, handouts, and outreach tools for facilitators to solicit and record input. Examples: a brief questionnaire, polling, visual preference surveys, interactive display boards, and sticker-dot voting. The consultant will work with the Advisory Committee and municipal staff to tailor outreach methods to the community and the implementation project.

Deliverables:

- i. Community Event maps, exhibits, handouts, and outreach tools
 - ii. Community Event results summary
- b. **Project and Event Promotion**
The municipality will post information about the project and the event on their municipal website, social media platforms, and any other available communication methods. CCPC can assist in promoting the event on the County's social media feeds.
- c. **Additional Stakeholder Engagement**
The municipality will identify stakeholders with important insights into the area's open space planning history and who have interests in the open space implementation project. These may include representatives from a planning commission, open space board, parks and recreation commission, environmental advisory council, public works, and other organizations and stakeholders deemed appropriate and applicable by the municipality. Collaboration may occur through emails, calls, or meetings, inviting them to a community event and/or an advisory committee meeting, and requesting their review of draft deliverables. The municipality is responsible for documenting and providing the stakeholder engagement results to the consultant at the appropriate and applicable phase in the planning process.

2. Action Plan Development

The consultant will prepare the Open Space Action Plan and facilitate the Advisory Committee's review and revision.

- a. **Plan Contents**
The Action Plan will generally be organized into background information, the results of the open space assessment, and the implementation plan for the open space projects. The Action Plan will contain the following sections:
- i. Executive summary
 - ii. How to use this plan
 - iii. Municipal Open Space Goals and Objectives (identified in previous plans)
 - iv. Community Outreach
 - Advisory Committee
 - Community event
 - Stakeholder outreach
 - v. Open Space Assessment
 - Planning and Regulatory Framework
 - Administrative capacity

- Issues and opportunities related to implementation
- Key Findings
- vi. Implementation Project. The implementation plan will include the following information, when applicable:
 - Implementation steps and suggested timeline
 - Parties responsible for implementing
 - Cost estimate
 - Funding opportunities
 - Ongoing management

b. Plan Review

The consultant will submit the draft Action Plan to the Advisory Committee for review and feedback at least two weeks before the Committee meeting #3 to discuss it.

The municipality shall help facilitate reviews with other groups, including a planning commission, open space board, parks and recreation commission, environmental advisory council, public works, and other organizations and stakeholders deemed appropriate and applicable by the municipality. Two rounds of revisions are anticipated before the public acceptance/adoption meeting.

Deliverable: Draft Open Space Action Plan with up to two rounds of revisions

3. Public Meeting for Formal Acceptance or Adoption

The consultant will work closely with the municipality to support the Action Plan's formal acceptance or adoption process, which is required for grant reimbursement. With the consultant's support, the Advisory Committee will present the Action Plan to the governing body for formal acceptance or adoption.

4. Implementation Support

CCPC staff will meet with municipal representatives the month after plan adoption to provide guidance on implementation steps and to discuss county and other grant opportunities.

5. Project Schedule and Deliverables

The schedule depicts the timeframe for the project phases, tasks, meetings, and deliverables. The project timeframe will vary by scope and complexity, with some Action Plans completed within 9 months and others extending to approximately 12 months.

Est. Timeframe

1) Project Initiation

Months 0-1

- Project Kick-off Meeting
- Form Project Advisory Committee
- *Deliverables:*
 - *Meeting agenda*
 - *Revised scope of work, if necessary*

2) Open Space Assessment

Months 1-2

- Advisory Committee Meeting #1 – Open Space Assessment and Draft Implementation Strategies
- *Deliverables:*
 - *Open Space Assessment summary*
 - *Meeting agenda, materials, and summary*

3) Community Engagement

Months 3-5

- Community Event

- Project Promotion
- *Deliverables:*
 - *Presentation boards*
 - *Community event materials (display boards, handouts, public input tool such as a brief questionnaire)*
 - *Community event summary*
 - *Website and social media postings*

4) Action Plan Development **Months 3-10**

- Advisory Committee Meeting #2 – Open Space Assessment and Draft Implementation Strategies
- Advisory Committee Meeting #3 – Draft Action Plan Review
- *Deliverables:*
 - *Meeting agendas, materials, and summaries*
 - *Draft Open Space Action Plan and up to two rounds of revised drafts*

5) Public Meeting to Formally Accept or Adopt Plan **Months 9-12**

- *Deliverables:*
 - *Public Meeting materials and presentation*
 - *Final Action Plan*

6) Implementation Support **Month 10-13**

6. Project Budget:

A typical Open Space Accelerator project, as outlined in this Scope of Work, will require a \$20,000 budget.

7. Responsibilities

As the Grant Administrator, CCPC has several priorities and expectations for the Open Space Accelerator planning process and the development of the Open Space Action Plan.

The responsibilities of the municipality and Advisory Committee include:

- a. Delegate representatives to collaborate with the project team.
- b. Establish the Advisory Committee to guide the planning process.
- c. Ensure representatives remain as consistent as possible throughout the project.
- d. Confirm that the Action Plan will implement current plans and further publicly vetted open space and natural resource conservation policies.
- e. Organize, promote, and facilitate an event focused on open space and stewardship.
- f. Identify project stakeholders as necessary, per the municipality's discretion.
- g. Present the plan to the governing body for formal acceptance or adoption.
- h. Tabling at the Community Event and providing additional copies and related materials not otherwise covered in this agreement.

The responsibilities of the consultant include:

- a. Facilitate the planning process for developing the Action Plan.
- b. Ensure the plan aligns with Chester County Landscapes3's goals.
- c. Comply with the PA Municipalities Planning Code (MPC), where applicable.

- d. Ensure the plan sets achievable objectives and concrete steps in accordance with the municipality's organizational capacity to implement the Action Plan.
- e. Production of materials for the Community Event, Advisory Committee meetings, and Board of Supervisors meeting, as described in this agreement.