CALL FOR IMPACTFUL PROJECTS:
THREE SAMPLE SCOPES OF WORK FOR EXPLORATORY SCENARIO PLANNING
Fall 2020

SAMPLE SCOPE OF WORK #1:
One Day Workshop: Introduction to Exploratory Scenario Planning

SAMPLE SCOPE OF WORK #2:
Developing a Smart City Roadmap

THIS SCOPE:
SAMPLE SCOPE OF WORK #3:
Stakeholder Outreach for Climate Emergency Planning

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Overview

The Consortium for Scenario Planning, an initiative of the Lincoln Institute of Land Policy, promotes the use of next generation planning methods to help organizations better incorporate trends and uncertainties into their programs. To meet the growing demand for scenario planning, the Consortium is making these three **sample scopes of work available to provide a template for designing and procuring exploratory scenario planning services.**

The Challenge of Planning for Change
Traditional planning processes carried out by public, private and non-profit entities tend to acknowledge, rather than explore and incorporate, change. To reduce complexity, analysts have historically extrapolated trends lines from past to forecast future conditions. To reduce legal liability, planners often rely on existing assumptions that have endured regulatory scrutiny. For expediency, plans cover extended time horizons.

This conventional approach however is ill-suited to building effective preparation and responses for disruptive trends including new technologies, economic restructuring, climate change, and now COVID-19. Moreover, many planning efforts only consider one of these topics when communities are facing the impacts of multiple trends at once.

Public, private, and non-profit sector entities are seeking ways to explore and integrate uncertainties into plans, policies, and projects. Examples of applications and desired outcomes for an exploratory scenario planning for climate emergency planning include:

- A metropolitan planning organization uses exploratory scenario planning to investigate infrastructure impacts under various heat, storm, and repetitive loss scenarios. The outcome is intended to identify metrics that describe when roadway investments are no longer sustainable, or where a change in infrastructure design is warranted. A variety of transportation stakeholders built these metrics, which will be incorporated into the organization's emergency planning.
- A city manager is tracking increases in average daytime and night-time temperatures. She wants to institute an Urban Cooling plan with new building materials and tree canopy rules but is getting pushback from real estate developers and homeowners responsible for implementing changes, particularly on lower income communities. The outcome of exploratory scenario planning yields not only plans and action metrics, but a storytelling platform for building empathy and justifying action.
- COVID-19 revealed systemic gaps in health care. With heightened investment in preventative health care, the state Department of Health plans to combine impacts related to climate change with virus recovery. The public engagement plan enlists

cross-Departmental representatives to build scenarios and civic expertise linking public health, climate stressors, and COVID-19 recovery.

Why Sample Scopes of Work for Exploratory Scenario Planning?
The shift in planning requires new approaches, skills, and processes to understand forces of change, articulate impacts, and identify next steps. Because these new planning approaches are new, there are few "go bys" for guidance. These scopes are intended to facilitate the process for:

1) Developing a Request for Qualifications (RfQ) or Request for Proposals (RfP) to hire scenario planning consultants, or
2) provide a work plan for developing scenario planning workshops in-house.

The scopes are written to provide (1) educational information on scenario planning and (2) copy-and-paste (and customizable) language for RfP and work plan development. Within the scopes, we provide rough estimates on level of effort and hours, as well as factors that drive costs and resources.

There are three sample scopes of work for three topics:
Scope 1 a one-day workshop addressing trends
Scope 2: developing a technology roadmap
Scope 3 (this document): planning for climate emergency planning

Who Can Use These Scopes?
Example users: Entities whose mission will be affected by climate change and other trends
States, cities, and counties that are in the first stages of plan and policy updates
Metropolitan Planning Organizations (MPOs) and other Regional Agencies
Non-profit organizations
Economic Development Entities
Regional Task Forces (Smart City, Climate, Autonomous Vehicles, Strategic Planning)
Private Sector entities (transportation, real estate development, asset management)
Campus managers

How Can My Organization Use These Scopes?
Example uses:
- Any decision or process where climate action impacts stakeholders in different ways
- As a first step in an organization's Strategic Planning
- "Stress testing" decisions to examine how options work under various scenarios
- "Future-ready" updates to Comprehensive, Climate, Transportation and Economic Development plans, as well as smaller sector plans or projects
- Creating action plans to proactively address trends and resilience
- Engaging stakeholders and the public on areas of rapid change and uncertainty

Introduction

Why Use Exploratory Scenario Planning for Climate Emergency Planning?
This scope of work provides details for procuring scenario planning services as part of developing a climate emergency plan. In the first generation of climate planning, agencies created scenarios describing what may happen given changes with key variables (e.g., sea level rise and/or changes in temperature).

Climate action plans represent a second generation of plans, in which cities identify strategies for reducing their carbon footprint, often after declaring a climate emergency. Increasingly, cities are addressing a third type of planning effort for responding directly to climate-related shocks and stressors. Shocks and stressors vary across the country and include sea level rise, wildfires, water shortages, heat waves and disease outbreaks. As these events occur more frequently, and with increasing severity, communities are grappling with the questions of when and how to act. While plans have focused on institutional responses, climate emergency planning will increasingly turn to the neighborhood, household, and individual levels.

> *In other words, communities need to identify trigger points after which current policy and investment decisions can no longer be justified and/or sustained under status quo practices, rules and standards. Likewise, a trigger may be used to activate funding or investments for mitigation.*

Example trigger points related to impacts can include, but are not limited to:
- Casualties from a hurricane and/or flooding (number of deaths, number of buildings damaged)
- Repetitive losses from wildfires at the urban interface (number of properties damaged two or more times over the past 10 years, number of building permits issued in urban/wildfire interface zones)
- Losses related to heat waves (number of deaths, number of electricity brownouts)
- Recurring infrastructure failure in coastal zones (number of sanitary sewer line failures, sea walls breached)

Planning for climate emergency declarations can meet several objectives:
Planning: To create a climate emergency plan with distinct action triggers.
- Internal: convene departments and regional agencies who will be responsible for new policies, standard operating procedures (SOPs), and emergency response.
- External: engage potentially-affected stakeholders to better describe looming events, triggers and corresponding action.

Policy: Use climate emergency plans to forecast how to amend laws, policies, and regulations. Use scenario planning to spark early adoption of practices that mitigate climate impacts.

Preparation: Use the process to examine local climate trends, recent data, and plausible scenarios on items such as timing, severity, location, damage, costs, cascading impacts, and the ability to effectively respond.

Variables That Drive Level of Effort & Cost for Scenario Planning
Number of Departments (including regional agencies, state representatives)
Number of participants unfamiliar with scenario planning and climate risks - which will require more time explaining the process, its components, and the value
Number of professional staff - and their level of expertise
Client's existing work on climate change – existing and on-going studies, reports, partnerships, previous stakeholder engagement
Product – the complexity of the product desired will drive costs *This scope does not entail a full climate risk assessment or quantification of action triggers for policy development. Rather, this scope engages targeted stakeholders.*
Stakeholder Outreach – Outreach efforts are critical to gain public trust. This scope assumes four workshops (one internal/three external). Costs will be driven by number of events and ability to piggyback efforts onto planned outreach/communications
Customization – How an organization may customize the process to meet specific needs (e.g. multiple workshops, use of modeling software)

Table of Contents for this Scope of Work (beginning page 6).

Before You Get Started

Resources on Exploratory Scenario Planning

The Consortium for Scenario Planning has several resources listed on its site. Please visit scenarioplanning.io.

Resources on Climate Emergency Planning
The Climate Mobilization
FEMA Planning Guides - The Federal Emergency Management Administration (FEMA)

Going Virtual
The interactive aspects of exploratory scenario planning can be carried out using online engagement platforms such as Zoom and Microsoft Teams. Interactive features include:

Breakout rooms: Workshop organizers can assign participants into smaller groups – or groups that are considering individual topics
Annotation tools: Drawing tools allow participants to mark up maps, graphics, and diagrams
Polling: Polling tools allow organizers to survey the group during a meeting
Chat: The chat features allows participants to provide input throughout the meeting, which can be saved and automatically recorded
Security features: With recent upgrades and new features, the online platform providers have taken action to remedy security problems

Assumptions
- *This scope is targeted to public agencies, though can be useful for non-profit and for-profit organizations.*
- *The scope is written to explore and identify climate emergency action triggers. This may be a part of creating or updating a local climate action plan.*
- ***This scope is intentionally small; it does not include a full climate analysis, and uses smaller, focused stakeholder groups.***
- ***Terms:*** *[Organization] refers to client and consultant refers to either a chosen vendor or head of this exploratory scenario planning + outreach project.*
  - ***Working group:*** *a steering committee that may include both internal and external representatives.*
  - ***Stakeholders****: A group of constituents likely to be impacted when enacting a climate emergency and associated changes in policy, plans and projects. This scope includes one workshop for internal-only stakeholders and three workshops for the wider stakeholder group.*
- *The client will be largely responsible for identifying and inviting stakeholders.*
- *The client will be responsible for gathering internal information related to stakeholder identification and outreach, inventory of climate initiatives, the client's communications, and schedules for related activities (e.g. budgets, plan updates, policy and regulatory activity). This can include other local and regional agencies depending on priority climate drivers.*

Sample RfP/RfQ: Stakeholder Outreach for Climate Emergency Planning

Purpose Statement *(may be modified to fit local conditions and context)*

While many communities have plans for mitigating and adapting to climate change, the accelerated pace of predicted events, such as sunny day flooding in coastal areas and increased nighttime temperatures, poses a new urgency for action.

The first generation of climate-focused scenario planning described a variety of plausible events, many of which are unfolding today. Over the past decade, communities have used results of scenario planning efforts for articulating change drivers, updating models, developing likely and preferred options, and building best practice toolkits for adaptation and mitigation. However, two years of extreme, record-setting events (e.g. hurricanes, wildfires) has spurred a new kind of action in the form of climate emergency declarations.

While there is no one formal definition, a 'climate emergency' typically includes two types of action: (1) how to reduce local contributions to overall climate impacts, and (2) how to respond to local adverse events and/or conditions. Some of the early declarations from the United States and Europe include dates for developing a plan, establishing a council, conducting education, and identifying research needs.

These activities form a program's foundation, however, a critical assumption underlying both actions listed above is that, at a certain point, stakeholder investments (e.g., property, businesses, fleets) can no longer be maintained under existing rules and standards. But at what point is that certain?

This is where exploratory scenario planning can help navigate complex and controversial conversations about change, reallocating investments, and strategic retreat.

> *Customization Tip: Example Rationale Statements*
> *To justify scenario planning for climate emergencies, insert 3-4 sentences on local climate change drivers, current impacts and any information on trends. For example:*
> - ***Heat Waves:*** *Our community has experienced [# of nighttime record temperatures] which is related to [local health/environmental/economic impact]. To reverse this trend, our community will need to embark on a strategic urban cooling plan.*
> - ***Excessive Rainfall:*** *Our community's infrastructure can no longer handle rain and stormwater volumes associated with climate change. Last year, losses include [dollar amounts of federal, local and insurance industry outlays]. For [# properties] repetitive losses represent [# times over past 10 years]. Given the backlog of infrastructure upgrades throughout [name of city or county], we can no longer defend use of limited dollars to repair the same vulnerable properties.*

Climate change experts typically refer to impacts in terms of shocks and stressors. While shocks are extreme events, stressors emerge slowly over time. A climate emergency plan can address (1) a list of plausible extreme events (shocks) that trigger immediate actions, and (2)

a compilation of climate-related trendlines (stressors) where the community identifies future trigger or tipping points.

The purpose of this Request for Proposals is to (1) develop scenarios for a Climate Emergency Plan based on local climate drivers, (2) hold stakeholder workshops, and (3) identify potential action triggers. **This RfP does not entail a full climate risk assessment or quantification of action triggers for policy development. Rather, this scenario planning exercise is used to engage stakeholders in identifying climate drivers, examining "worst case" scenarios, discussing tipping points within these scenarios, and developing a shared understanding of steps needed to successfully develop a climate emergency response.**

The deliverables include (1) stakeholder and public engagement plan, (2) a preliminary workshop, (3) a research report, (4) three stakeholder workshops, and (5) a final report. If this procurement includes computer modeling, the consultant will provide a modeling report and results. If the results of this scenario planning are intended for integration into existing climate action and sustainability plans, the consultant will format the reports for easy integration into those reports.

> ***Customization Tip:*** *[Organization] can provide more background information in the purpose statement including a list of current climate activities, plans and partnerships*

Task 1. Project kick-off, work plan, and scenario planning team

Task 1. Project Kick-off and scenario planning for climate action
The project kick-off includes setting the details of project management and a kick-off workshop (recommended 3-4 hours) covering climate drivers and trends.

> **Task 1.1. Project Management:** This meeting between consultant and [*organization*] will:
> - Articulate direction-setting defining needs, desired outcomes, and stakeholders
> - Establish a process for setting a vision and goals or guiding principles
> - Determine the project management structure, including roles and responsibilities, for the project team and stakeholders
> - Outline work plan development and schedules
> - Outline initial workshop details
> - Develop the attendee list for Task 1.2 Preliminary Workshop [*organization*] will provide list)
>
> **Task 1.2. List of Internal Working Group and Stakeholders**: The [*organization*] will produce names for the working group and a stakeholder list. The consultant and [*organization*] will define roles and responsibilities for each. The working group will also assist in developing the stakeholder outreach workshop.

Task 1.3. Preliminary Workshop for Internal Stakeholders: [*Organization*] and the consultant will plan and conduct a preliminary workshop. Given the controversial nature of climate change and the potential for sweeping changes to regulations governing public and private investments, this preliminary workshop will be used to address political risks during the scenario planning project. Task 1.3 is essentially a dry run for the three external scenario workshops in Task 4.

Task 1.3.1. **Memo**: Based on information from Task 1.1., the consultant will send a memo with workshop details including: initial list of workshop attendees, stakeholder workshop approach, agenda outline and list of preparation materials. If the workshops will be 100% virtual, the workshop plan will address an online engagement agenda including platform used, whether breakout rooms will be used (and if so, describe moderator roles), and any other needs cited by [*organization*].

Task 1.3.2. Develop internal preliminary workshop agenda. The consultant will develop the workshop agenda, which includes:
- List of materials to send ahead of the workshop
- List of participants (supplied by [*organization*])
- Opening remarks
- Background presentation on scenario planning for climate emergencies
- Discussion on pertinent local climate drivers and impacts
- Interactive tabletop exercise: role playing and scenario planning
- Any other locally-relevant topics
- Report out (1) workshop results including climate drivers, (2) sensitivities and political risks, (3) research needs, and (4) ideas for formulating the work plan for the three external stakeholder workshops.

Optional: If modeling is included, identify modeling requirements (e.g. existing modeling runs, capabilities, data sets, whether additional resources required)

Task 1.3.2. Conduct preliminary workshop: Working with [*organization*], the consultant will help prepare and conduct the 3-4-hour workshop.

Task 1.4. Preliminary workshop report: This consultant will (1) compile the elements of a climate emergency plan, (2) list of 5-7 local climate drivers and impacts, (3) identify and explore the sensitivities and risks associated with such planning, (4) finalize the project work plan and (5) develop a plan for public engagement and three stakeholder workshops. Identify stakeholder types and the sensitivities/political risks for each group.

Task 1 Level of effort: Will depend on (1) number of available staff, (2) availability of existing climate information, and (3) complexity of local climate trends, (4) project duration
- Project management: 20-35 hours

- Preliminary workshop preparation, execution, and report out: 25-35 hours (not including workshop attendee time)

Task 2: Stakeholder Identification and Engagement Plan

The consultant will develop a stakeholder identification and engagement plan that includes representative stakeholders to describe potential climate emergencies. The purpose of this engagement task is to:

(1) better identify groups affected by climate impacts and subsequent changes in policies and investments
(2) learn how to use exploratory scenario planning as a planning engagement tool
(3) use a smaller group of potentially-affected stakeholders to build a larger program.

Task 2.1. Develop Stakeholder Identification and Engagement Plan: This plan will help define impacted communities and stakeholders. While [*organization*] assumes a large role in the engagement portion of this project, consultant will assist in developing messaging to three key audiences:

- ***Communities disproportionately impacted by climate shocks and stressors:*** *The consultant will work with [organization] to identify groups representing communities disproportionately impacted by climate shocks and stressors. [Organization] will provide representatives' names as participants for scenario planning.*
- ***Decision makers within the public, private and non-profit sectors who have a primary role in preparation and response***: *Customized outreach includes (1) gathering, reviewing and updating existing climate and emergency response plans, (2) using the scenario planning process as a means to communicate urgency and action, and (3) methods for communicating highly sensitive topics related to risks and change management.*
- ***Stakeholders likely to be impacted once action triggers are invoked:*** *The consultant will work with [organization] to identify groups likely to be most impacted by changes in public policy, investments, and funding. Given the sensitivities, the consultant will work closely with [organization].*

Task 2.1.1. Develop personas and profiles for each group: For each group develop personas (a character representing members of a larger group). Include general socio-demographic data, geographic distribution, and other relevant information. Describe known and potential stressors, including climate stressors.

Task 2.1.2. Identify stakeholders for scenario planning: [*Organization*] will identify groups and individuals to invite to the scenario planning workshops in Task 4.

Level of effort: Will depend on (1) number of available staff, (2) availability of existing climate information, and (3) complexity of local climate trends. The deliverable is the Stakeholder Identification and Engagement Plan (for Task 4).
- Stakeholder Engagement Plan: 10-25 hours

Task 3. Research

Task 3.1. Initial interviews: The consultant, working with the [*organization*] and external stakeholders, will conduct five (5) interviews of external stakeholders, chosen by the [*organization*], with knowledge on local climate impacts and affected communities.

> **Task 3.1.1.** Develop survey questions and get feedback from the [*organization*].

> **Task 3.1.2.** Schedule and conduct 5 phone interviews, each 30 minutes long.

Task 3.2. Climate emergency planning best practices: Based on results of Tasks 3.1 and 3.2, the consultant will develop lists of best practices. Best practices according to local climate impact drivers will fall into several categories, including but not limited to:
- Use of scenario planning for climate change planning and programs
- Climate Emergency action planning
- Inter-related trends (e.g., new technologies, changes to funding sources, demographics)
- Setting actions and action triggers in response to climate impacts
- Community and stakeholder engagement
- Preparedness
- Legal implications and case law

Task 3.3. Inventory and Background: This task includes gathering information on existing climate activities, plans, data, and partners.
This could include, but is not limited to:
- Existing climate (or related) programs, Geospatial and IT Departments
- Plan updates (recent, pending) that include a climate or mitigation/adaptation component. (e.g. Comprehensive or General Plans, Waterfront Plans, Transportation Plans, Sustainability Plan, Complete/Green Streets, flood maps).
- Regulatory and policy activity (recent, proposed) including FEMA
- Related budgets (e.g., Capital Improvement projects, tree canopy)
- Equity (programs on vulnerable populations)

Task 3.4. Local Climate Emergency Planning: Research should also focus on the most relevant local climate impacts. For each climate impact driver, provide information on:
- Most current research, data and modeling
- Impact trendlines (possible, plausible, likely)
- Secondary or cascading effects and impacts

- Primary impacted communities and populations

Research should report out on each impact in the following way:
- Indicators
- Impact metrics
- Trendlines

For each impact, the consultant will develop stories to communicate various scenarios. If modeling is included, use model runs to determine one or more storylines for impacts. The consultant will develop stories to best communicate impacts to stakeholders identified in Task 2.1.
- Compelling scenarios (including worst case)
- Example tipping points (qualitative, or if appropriate, quantitative)
- Legal, financial, and regulatory frameworks involved.

Task 3.5. [*Organization*] + consultant call: This call will review the research in Tasks 3.1 and 3.2. The purpose is to review the information to be used in the scenario planning exercises.

Task 3.6. Draft research report

Task 3.7. Research presentation: The consultant will present the research report to the working group and incorporate comments into a second presentation. This presentation should include, at a minimum:
- Overview of kick-off meeting
- Status of local climate research, planning, policy, and activities
- Stakeholder information (based on the three main stakeholder groups)
- Outlines of the three stakeholder scenario planning sessions

Optional Task 3.8. Presentation to decision makers: At this point the team may want to present priorities to decision makers and/or the public. In this optional task, the consultant will prepare a presentation and memo to decision makers or communications for dissemination.

Optional Task 3.9. Forecasting and modeling tools
Optional Task 3.9.1. The [*organization*] may request recommendations on forecasting and modeling tools for use in developing the roadmap. For this task, the consultant will develop recommendations through the following sub-tasks:
- Research planning assumptions, data sets and forecasting tools, as well as best practices from other communities
- Outline key variables, change drivers,/indicators
- Develop a list of scenario indicators (to test how local priorities test against scenario outputs) for model runs
- Recommend tools (including a scan of benefits/limitations, data requirements, outputs and case studies of other communities' use of the tool)

- Work with the client or organization to conduct test runs or product demonstrations (demos)
- Conduct and refine model runs
- Present results and if needed, information for maintaining a climate emergency data strategy

Task 3 Level of effort: Will depend on (1) the extent of local climate plans and available information, (2) number of researchers involved, (3) the complexity of legal and regulatory frameworks. This does not include optional tasks.
- Interviews including preparation: 8 hours
- Legal and regulatory frameworks and best practices research: 25-45 hours
- Inventory of existing materials and local climate drivers: 12-25 hours
- Research report and presentation: 10-20 hours

Task 4: Three Stakeholder Scenario Planning Workshops

This task involves planning and executing three scenario planning workshops with the three identified stakeholder groups:
- Communities disproportionately impacted by climate shocks and stressors
- Decision makers within the public, private and non-profit sectors who have a primary role in preparation and response
- Stakeholders likely to be impacted once action triggers are invoked

The results of the stakeholder workshops will be summaries of impacts listed by stakeholder group, likely/plausible impacts, metrics, trendlines and recommendations on action triggers.

Task 4.1: Stakeholder workshop pre-planning

> ***Note****: Refer to Sample Scope of Work #1: One Day Workshop – Introduction to Exploratory Scenario Planning*

The consultant and [*organization*] will discuss workshop goals and general details (schedule, location(s), number of participants, supplies, dates). For each of the three groups, the [*organization*] will develop a list of required participants and/or organizations. The [*organization*] will also assemble an internal group of volunteers to serve as table leads.

The [*organization*] and consultant will also develop a draft agenda of the scenario planning sessions. At a minimum, this includes opening remarks, background presentation, table-top or other interactive exercise (including virtual sessions) and report out.

Based on the desired product(s) and scenario planning needs, the [*organization*] and consultant will decide on how to structure a meaningful interactive exercise. In general,

workshop design **will revolve around critical questions or discussion prompts**. These prompts should be crafted in ways that build to the product.

> *Customization Tip: Examples of interactive scenario building activities include:*
> *Table rounds: Groups of 6-8 are given a task (e.g. examine change drivers, impacts and policies for an upcoming comprehensive plan update or to a geographic location such as a corridor). The exercise gathers participants' ideas on boards or on maps. If maps are used, make sure to include directional indicators, scale, and any key landmarks or boundaries are printed on the maps.. For table rounds, it helps to have easels, post-it notes and poster paper to document ideas. For online engagement, use of virtual break-out rooms can be used instead of table rounds.*
> *Role Playing: In this version, participants are given personas and asked to respond to questions and prompts for the assigned persona. This approach builds understanding and empathy, as well as insights on potential trade-offs.*
> *Walk audits: Participants are sent on a walk tour of the focus area (e.g. transit station, downtown) to document possible impacts. Make sure the walk is safe – you may need to get safety releases from participants or procure reflective vests*
> *Forecasting and trade-offs: Groups assemble around tables with a technician who feeds participants' ideas into forecasting software to compare changes, tradeoffs or other factors.*

The [*organization*] will convene a small group of participants to review the exploratory scenario planning exercise, details, and desired outcomes. The consultant will revise the draft agenda to incorporate edits. If needed, the consultant and [*organization*] may need to develop three different agendas based on the stakeholder group.

The deliverable for Task 4.11 is a final Workshop Agenda (or agendas). Working with the [*organization*], consultant will send a final, detailed agenda with a "run of show." The agenda will include opening remarks from [*organization* or invited dignitaries] and background on the topics to be covered in the scenarios.

Task 4.2. Scenario planning workshops

Task 4.2.1. Set up and dry run: Consultant will carry out room (or walk tour) set up and conduct and dry run either the night before or 1.5 hours before the session begins. This includes testing AV equipment and Wi-Fi connections. The organization will also invite table leads and revise instructions if needed.

> *If the workshop is videotaped, obtain releases from participants, or let them know by participating in the workshop they agree.*

Task 4.2.2. Conduct workshop: Consultant, working with the organization, will conduct the workshop. The consultant will help lead the workshop, monitor break out groups, conduct report outs, and gather information from table leads.

Task 4.3. Compile findings: Based on the results from the report out, the consultant will compile scenario planning results, next steps, and any issues to be resolved. The consultant will format this report to fit the desired product. *(Note, to save costs, the client organization can compile results and produce the report).*

Task 4 Level of effort: Will depend on (1) number of people attending, (2) ease of room setup, (3) complexity and length of workshop, (4) number and types of workshop input to incorporate.

- **Workshop Pre-Planning:** Expect to spend 20-35 hours for general workshop planning that applies to all three workshops. This may include a powerpoint, handouts, and other materials.
- **Workshops:** For each of the three workshops, expect to spend 2-3 hours for dry runs and set up. This is in addition to the actual workshop, which should be 2-3 hours though depends on local needs. Budget around 2 hours for clean-up and for a workshop debrief.
- **Reports:** Expect to spend 4-10 hours compiling notes

Deliverable: Workshop materials, Workshop report

Task 5: Final Report

The final report shall combine the reports created in Tasks 2,3, and 4, as well as recommended next steps.

Task 5.1. Call with [*organization*]: The consultant and client will meet or hold a call to discuss the format of a final report, which should include a summary of deliverables submitted in Tasks 2 and 3, as well as an overview of activities in Task 4.

Task 5.2: Final report

Level of Effort

- **Final report:** expect to spend 25-35 hours synthesizing and compiling information for the entire project.