INSTRUCTIONS

CONTRACTOR / GRANTEE

SCOPE OF WORK & PROGRESS REPORT

COMMUNITY OPPORTUNITIES FUND

FIRST 5 LA
Champions For Our Children
SCOPE OF WORK INSTRUCTIONS

Refer to Sample provided on page 5

HEADER

Contract Number  Indicate contract number provided by First 5 LA. If contract number has not been provided, leave blank.

Agency Name  Indicate the legal name of your agency, as stated in the contract.

Project Name  Indicate the program name being funded by First 5 LA.

Project Length  Indicate the number of approved project years. Include total project length with start and end date in the following format, [e.g., 3 years (7/1/08 - 6/30/12)].

Contract Period  Indicate the current year of the project length. Include current contract period for the respective scope of work with start and end date in the following format, [e.g., Year 1 (7/1/08-6/30/09)].

Revision Date  Indicate the revision date only if the scope of work/work plan was revised through a modification after the contract was established.

Project Goal/Intermediate Outcome

Intermediate Outcomes are organizational level outcomes. They are the realized improvements or milestones in the organization’s capacity or policy/advocacy programs that will be accomplished at the completion of the grant that support First 5 LA Funding Priorities.

Objectives/Short-Term Outcomes

Indicate a clear and measurable objective/short-term outcome that states the anticipated result. Include: who what, when, where, how, and how much for each objective. Short-term outcomes are project level outcomes. They are the immediate changes in the organization’s capacity or policy/advocacy project expected to result from the strategies and activities.

Example of objective:

By June 30, 2009, ABC Agency will create a master plan for a school readiness campaign targeting local school districts in Los Angeles County resulting in nine (9) new child care sites.

NOTE: The objective status should remain unchecked when completing the Scope of Work.

Strategies and Activities

Indicate the strategies and activities leading to the fulfillment of the corresponding objective/short-term outcome. The Strategies should include benchmarks or milestones,
specific processes or events in chronological order that mark progress towards each objective.

The Activities are the necessary steps related to each strategy. Activities should include the methods by which a strategy will be completed, e.g. phone, meeting, interviews, document reviews, focus groups, etc. Being as specific and detailed as possible will make it easier to identify implementation gaps.

Be sure to include the appropriate quantity or frequency of associated strategies or activities. Together the strategies and activities should provide a detailed outline of the process of achieving your objective/short-term outcome. Refer to the sample provided on page 5.

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**Staff Assignment**

Indicate what staff (by title) will be responsible for the completion of the respective activity or subtask. If an activity will be completed by a consultant or subcontractor, indicate name of organization and also identify program staff member who will oversee the completion of the activity, if information is available. Be sure all staff listed in the Scope of Work is also included in the Budget.

Remember to submit the Memorandum of Agreement for consultants or subcontractors when available.

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**Timeline**

Identify the timeline needed to complete the respective activity and subtask. Indicate a start and end period using month, day and year. If timeline is not yet available, provide a rough estimate for the respective activity. If necessary, the timeline may be revisited through a revision of the Scope of Work at a later date if necessary.

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**Deliverables**

Identify the product(s) resulting from activities and subtasks described in the Scope of Work. Each deliverable should have an associated due date. A deliverable may be submitted as part of your Scope of Work-Progress Report or under a separate cover. Consult with your designated Commission staff representative on any questions you may have.

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**SCOPE OF WORK REVISIONS**

If you have questions regarding any revision to the Scope of Work, contact your designated Commission Program Officer as the first step to discuss the intended revision. After discussing the circumstances and details of the modification with your designated Commission representative, modifications to the Scope of Work must be submitted to your assigned Commission staff representative for approval prior to the implementation of the new activities. Some revisions to the Scope of Work may also require revisions to the budget. Remember to consult with your Commission Program Officer before considering any changes.
Your project progress reporting will consist of three (3) components: 1) Required Cover Letter, 2) Progress Narrative; and 3) Progress Report. Due dates for the reports will be provided by your designated Commission staff.

1 - Required Cover Letter

The report must be accompanied by a cover letter on the agency’s letterhead with notation of what the document is, identification of report period, contract number, and signature by an authorized signatory to certify the information in the report.

2 - Progress Narrative

Write a narrative highlighting the progress made during the report period. Include progress related to each objective/short-term outcome, as well as strategies and activities. Please identify and discuss the challenges or delays affecting the progress of the objectives, activities or subtasks. Please also discuss how these challenges were addressed.

Title the document “Progress Narrative” and the add contract number and report period on the right hand top corner.

3 - Progress Report

The most expedient way to complete your Progress Report is to create the report using a file (computer) copy of your Scope of Work document. Once you have created the document copy, you can proceed with the following instructions.

Document Title Change

Using the file copy of the Scope of Work, delete “Exhibit A: Scope of Work” and change the title of the document to “PROGRESS REPORT”.

Header

Complete Header fields per instructions on page 1. If you created a file copy, this information should already be on the document and the only change needed would be the Document Title Change (above).

Report Period

Indicate report period for which the report is being prepared for. Include start date (month, date, and year) and end date (month, date, and year). For example: 07/01/08 – 6/30/09.

Objectives/Short-Term Outcomes

Under each objective, check box indicating the status of the objectives: 1) COMPLETED, 2) IN PROCESS, or 3) DELAYED. Please copy and repeat for each objective in the progress report. To select a box, double click on the box and select the default value, “checked”.
**PROGRESS REPORT INSTRUCTIONS**

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**Progress**

Since you will be using a file copy of the Scope of Work document, all activities proposed should already be in your document. Under each activity, type “**Progress**” and use a bullet outline as in the Sample Progress Report on page 6. Identify the actions that were taken during the report period to complete the respective activity. You will only need to report on the activities corresponding to the report period. You may also report on activities not yet due, if you have made progress on those activities.

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**Timeline**

Indicate the actual timeframe in which the activity was completed for the progress report. The original Scope of Work timeline should not be changed unless there is an approved modification to the scope of work.

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**Deliverables**

Label deliverables identified in the Scope of Work for your Progress Report. Indicate the number assigned to the attached deliverable for the respective completed activity. Use the same numbering system for labeling attachments. For example, “1a” will correspond to an attachment for Objective 1 – Activity 1; “2a” will correspond to Objective 2 - Activity 1, etc.
### Objectives
Include who, what, when, where, how and how much for each objective.

### Activities and Subtasks
Indicate the activities and subtasks leading to the fulfillment of the objective. Include benchmarks or milestones in chronological order. Include the appropriate quantity or frequency of the associated activities or subtasks.

### Staff Assignment
Indicate staff, consultants or subcontractors responsible for the respective activity or subtask.

### Timeline
Indicate start and end period.

### Deliverables
Indicate Date Due

<table>
<thead>
<tr>
<th>Objective status:</th>
<th>Activities and Subtasks</th>
<th>Staff Assignment</th>
<th>Timeline</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Identify three target project areas.</td>
<td>Project Director, Consultant, Community Facilitators</td>
<td>7/1/08-1/31/09</td>
<td>1a. List of priority areas - Due 10/1/08</td>
</tr>
<tr>
<td></td>
<td>a. Develop list of First 5 priority areas based on First 5 child care needs criteria.</td>
<td></td>
<td>2/1/09-6/30/09</td>
<td>1b. Map of priority target areas - Due 12/1/08</td>
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<tr>
<td></td>
<td>b. Map list of priority target project areas.</td>
<td></td>
<td></td>
<td>1c. Convening for 1 target project area - Due 1/15/09</td>
</tr>
<tr>
<td></td>
<td>c. Convene 3 neighborhood and institutional stakeholders in 1 target project area.</td>
<td></td>
<td></td>
<td>1d. Convening for 2 remaining target areas - Due 6/30/09</td>
</tr>
<tr>
<td></td>
<td>2. Within target areas, identify and meet with sources of available capital funds for child care centers.</td>
<td></td>
<td>7/1/08-2/1/09</td>
<td>2. List of available sources for capital funds - Due 1/15/09</td>
</tr>
</tbody>
</table>
SAMPLE – Progress Report

Contract Number: ###
Agency Name: ABC Agency
Project Name: Child Care Centers Project
Project Length: 3 Years (07/01/08 – 06/30/11)

### Objectives
Include who, what, when, where, how and how much for each objective.

### Activities and Subtasks
Indicate the activities and subtasks leading to the fulfillment of the objective. Include benchmarks or milestones in chronological order. Include the appropriate quantity or frequency of the associated activities or subtasks.

### Staff Assignment
Indicate staff, consultants or subcontractors responsible for the respective activity or subtask.

### Timeline
Indicate start and end period.

### Deliverables
Indicate Date Due.

<table>
<thead>
<tr>
<th>Objective status:</th>
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<th>Timeline</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN-PROCESS</td>
<td>1. Identify three target project areas: &lt;br&gt;• Develop list of First 5 priority areas based on First 5 child care needs criteria. &lt;br&gt;• Map list of priority target project areas. &lt;br&gt;• Identify neighborhood and institutional stakeholders. &lt;br&gt;• Convene 3 neighborhood and institutional stakeholders. &lt;br&gt;<strong>Progress:</strong> &lt;br&gt;• Met with First 5 LA staff to identify priority areas on 8/12/08. &lt;br&gt;• Priority areas established with First 5 LA. &lt;br&gt;• Mapped 1 of 3 target project areas; remaining target project areas will be completed by 11/1/08. &lt;br&gt;• Identified and scheduled meetings with 15 neighborhood and 10 institutional stakeholders. &lt;br&gt;• Convened 1 neighborhood and institutional stakeholder group on 12/5/08.</td>
<td>Project Director, Consultants</td>
<td>7/1/08-1/31/09</td>
<td>1a. List of priority areas- Due 10/1/08 Attachment 1a</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1b. Map of priority target areas- Due 11/1/08 Attachment 1b</td>
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<td></td>
<td></td>
<td>1c. Convening for 1 target project area -Due 12/15/08 Attachment 1c- meeting notes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>2/1/09-6/30/09</td>
<td>1d. Convening for 2 remaining target areas- Due 6/30/09</td>
</tr>
<tr>
<td>COMPLETE</td>
<td>2. Within target areas, identify sources of available capital funds for child care centers &lt;br&gt;<strong>Progress:</strong> &lt;br&gt;• Identified 15 possible funding sources. &lt;br&gt;• Met with 5 foundations to discuss fund opportunities. &lt;br&gt;• Will meet with 10 additional foundations in 2/09.</td>
<td>Project Director</td>
<td>7/1/05-4/1/06</td>
<td>2. List of available sources for capital funds- Due 1/15/09</td>
</tr>
</tbody>
</table>