

## **CHAPTER 8 SCOPE OF SERVICES MEETING**

Scope of services meetings are optional, but may be held for complex projects or where procedural issues exist. Teleconference (or GoToMeeting) scope of services meetings should be used where practical. The purpose of the scope of services meeting is to provide a forum for all concerned parties to discuss the proposed project, answer questions on the scope of services, method of compensation, instructions for submitting proposals, and other relevant issues. The need for a meeting will be determined by the Project Manager in conjunction with the PSU. Since the RFP package is the working document on which a scope of services meeting is based, the shortlisted Consultants may be furnished a copy of the RFP at least one week prior to the scope meeting, but as a minimum, a copy of the scope of services. The scope of services meeting when held may be attended by representatives of the shortlisted Consultants, as appropriate, Project Manager, other functional area representatives (as necessary), and moderated by a PSU representative. The Project Manager will explain and answer questions to clarify project objectives. The PSU representative will explain and answer questions to clarify contractual requirements, method of compensation, and selection procedures. The PSU will establish an information cutoff date at the scope of services meeting. No questions will be answered relating to the project objectives after the information cutoff date. The Consultants will be instructed as to where to direct all questions after the scope meeting.

During and after the scope of services meeting, it is the responsibility of the PSU to ensure that each shortlisted Consultant develops their technical proposal with the same information. If a Consultant receives information from the PSU relating to the project prior to the Information Cutoff Date, the Department will ensure that all shortlisted Consultants receive the same information in a timely fashion, via email. The project file will clearly document all communications with any Consultant regarding the scope of services by the PSU.

At the conclusion of the scope meeting, or when it is reasonable to assume that no further scope changes will be required, the Project Manager will update the scope of services and staff hour estimate, as necessary. The updated scope and staff hour estimate should be made available to each member of the TRC prior to the evaluation of the technical proposals. Also, should changes result from the scope of services meeting, the shortlisted Consultants will be provided the updated scope of services.