

## White Paper From The JOC Education Committee

# Checklist for Joint Scope Meetings

Joint scoping is one of the most critical aspects of the Job Order Contracting (JOC) process. All individual job orders issued under a JOC master contract require joint scoping. This typically involves a site visit and discussions to arrive at a mutually agreed upon work narrative or detailed scope of work. The purpose of the Joint Scope Meeting is to provide Owner and Contractor with a mutually shared detailed understanding of the project.

The following items are usually discussed at the Joint Scope Meeting. Please note the checklist may vary slightly based on your specific contract requirements and government procedures.

1. Job Order or Task order number and title along with Project Site, Project Name and Location
2. Names of the Project Manager and team members assigned to the project
3. The name of the individual serving as facility liaison at the Project Site
4. Any limitations to work or special conditions
5. Define the Scope of Work to ensure a thorough and mutual understanding
6. Document the existing Project Site conditions and discuss the project budget
7. Note the staging areas and site access with procedures
8. Security/Safety and Security Clearance requirements
9. Presence of Hazardous materials and documentation
10. Methods and alternatives for accomplishing the work
11. Clarifications that may apply to the project
12. Testing and Inspection plans for materials
13. Owner drawings for the project or contractor's shop drawing for incidental design - if applicable
14. Discuss permits if applicable
15. Owner supplied material or equipment - if any
16. Determine if submitting a sub-contracting plan is required
17. Any Special safety requirements
18. Owner gives the timeline for the Schedule of Values to be submitted
19. The Project Schedule with phases and completion date
20. Discuss any special insurance requirements beyond the master contract requirements
21. An agreed date that the contractor will provide owner with the Detailed Scope Narrative
22. Determine time-frame for estimate proposal due date and the targeted project start date
23. Any other owner specific issues or topics related to the project or site

The Joint Scope Meeting is rather unique to the Job Order Contracting project delivery method. It is the first event scheduled once a project is identified. The contractor and facility owner meet at the job site to discuss the project and joint scope the project. Joint Scoping is responsible for virtually eliminating change orders in job order contracting. Change orders in job order contracting are rare and usually originate with the owner deciding to change the scope.