# OPC SB 1 Technical Assistance Program Full Proposal

Please respond to the summary information and full proposal prompts on the following pages. Please submit all materials as one attached PDF file to [OPC-TA@resources.ca.gov](mailto:OPC-TA@resources.ca.gov) by   
**July 13, 2023** by **5:00 PM** using the subject: [Main Applicant Name]-SB1 TA Program-Proposal.

## Section 1: Cover Page

|  |  |  |  |
| --- | --- | --- | --- |
| Contact Information | | | |
| **Lead Entity Name** |  | | |
| **Contact Person** |  | | |
| **Position/Title** |  | | |
| **Phone** |  | **Email** |  |
| **Mailing Address** |  | | |
| **Federal Tax ID#** |  | | |

**Subcontractor Information (if applicable)**

Please list all subcontractors below. Use the example provided and copy/paste for each additional subcontractor that is included on the project team.

**Subcontractor 1 Name**:

**Contact Person**:

**Position/Title**:

**Phone**:

**Email**:

**Mailing Address**:

**Federal Tax ID** **#**:

**Brief Description of their role in the project**:

**Letter of Commitment included in application? (Yes/No):**

## Section 2: Application Completeness Checklist

When submitting your full proposal package, please indicate if you have included or completed each item listed.

|  |  |  |
| --- | --- | --- |
| **Item** | **Requisite** | **Complete** |
| **Section 1:** Cover Page | Required |  |
| **Section 2:** Application Completeness Checklist | Required |  |
| **Section 3:** Response to Scope of Work | Required |  |
| **Section 4:** Project Work Plan | Required |  |
| **Section 5:** Project Schedule and Major Deliverables | Required |  |
| **Section 6:** Budget | Required |  |
| **Section 7:** Supplemental Documents |  |  |
| 1. Project Team Resumes or Curricula Vitae | Required |  |
| 1. Nonprofit Organization Pre-Award Questionnaire | Required\* |  |
| 1. Project Letters | Required |  |

\*Required for nonprofits only

For Section 3 – 7, draft your responses to the prompts below and **delete the instruction text** to ensure you maximize your page limit. Please keep your responses in Calibri, size 12 font. When answering these prompts, please refer to *II. Solicitation Priorities* and *IV. Evaluation, Selection, and Award* found within the Solicitation to obtain further context.

## Section 3: Response to Scope of Work

**The maximum page limit for Section 3 is** **2 pages**.

### Summary

The maximum word count for the Summary is 200 words. Include a brief description of the proposed project briefly summarizing the main point of the various sections of the proposal, including the features and benefits of the proposal.

### Project Management, Team, and Capacity

Provide a project management plan including the management structure of the team and project organization. Demonstrate the logic and feasibility of the methodology and proposal. Clearly define the sequence and relationships of major steps and methods for performing the actual work. Include methods to measure project progress against the plan. Describe the project team’s experience, qualifications, and capacity to complete the project, especially as it relates to the criteria under “Minimum Qualifications of Applicants” in Section *I. A. Essential Background and Information*, and “Applicant Team & Experience” in Section *IV. B. Technical Evaluation* found within the Solicitation. Include the project team’s resumes or curricula vitae as part of the attachments to this application.

### Methodology/Approach to Work

Describe your methodology and approach to the work. Identify specific techniques and methodologies that will be used and specific administrative and operational management expertise that will be employed to accomplish the scope of work. The scope of work, tasks, and deliverables have been listed in the Solicitation under Section *II. Solicitation Priorities.* Describe how previous skills that were developed in previous related work experience will be applied to the work described in this Solicitation. Please include the total hours allocated to complete each task.

## Section 4: Project Work Plan

**The maximum page limit for Section 4 is 3 pages.**

Develop a Work Plan that identifies all tasks, milestones, and deliverables by which progress can be measured and payments made. Consult Section *II. C. Tasks and Deliverables* in the Solicitation to ensure the work plan is addressing the full scope of work for each task, including your team’s specific SB 1 TA Program’s structure under Task 2. The estimated hours to accomplish each task should also be provided. Within the Work Plan, indicate how supervision and oversight will be conducted to ensure that the project will remain on schedule and that the distribution of workload is appropriate.

## Section 5: Project Schedule and Major Deliverables

**The maximum page limit for Section 5 is 2 pages.**

In the Project Schedule, identify all tasks, milestones, and deliverables by which progress can be measured and payments made. In the Major Deliverables Milestones table, provide estimated dates of completion of each deliverable.

### Project Schedule

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Year 1 (2023-2024)** | | | | | | | | | | | | | | | |
|  | **Aug** | **Sep** | | **Oct** | | **Nov** | | **Dec** | **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** |
| **Task 1** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 2** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 3** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 4** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Year 2 (2024-2025)** | | | | | | | | | | | | | | | |
|  | **Aug** | **Sep** | | **Oct** | | **Nov** | | **Dec** | **Jan** | **Feb** | **Mar** | **Apr** | **May** | **Jun** | **Jul** |
| **Task 1** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 2** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 3** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Task 4** |  |  | |  | |  | |  |  |  |  |  |  |  |  |
| **Year 3 (2025)** | | | | | | | | | | | | | | | |
|  | **Aug** | | **Sep** | | **Oct** | | **Nov** | **Dec** |
| **Task 1** |  | |  | |  | |  |  |
| **Task 2** |  | |  | |  | |  |  |
| **Task 3** |  | |  | |  | |  |  |
| **Task 4** |  | |  | |  | |  |  |

**Major Deliverable Milestones**

|  |  |  |
| --- | --- | --- |
| **Task** | **Deliverable Name** | **Estimated Due Date** |
| Task 1: Administration Coordination and Reporting | 1. Quarterly Reports 2. Final Report | 1. Quarterly |
| Task 2: Establishing the SB 1 TA Program | 1. Final SB 1 TA Program Work Plan 2. TA Program Framework 3. TA Recipient Work Plan Template |  |
| Task 3: SB 1 TA Outreach and Education | 1. Outreach and education plan 2. Materials used in any outreach events, including webinar recordings, slides, or flyers 3. Summaries of outreach and education events, including number of attendees, etc. |  |
| Task 4: SB 1 Grant Program Direct Application Assistance | 1. Workplans for each TA Recipient 2. Minutes and summaries of meetings with TA Recipients 3. Templates and materials utilized in application coordination activities 4. Documentation of Application Submittals 5. Check-ins with OPC to provide updates on applicants’ major milestones and challenges |  |

## Section 6: Budget

**The maximum page limit for Section 6 is 1 page.**

### Budget Template

Please include the total cost of the project ($1,000,000 maximum), including estimated costs broken down by category and major task. For this budget table, please include only OPC secured funds. When creating your budget, please refer to [OPC’s Budget and Invoice Guide](https://www.opc.ca.gov/webmaster/_media_library/2023/05/Budget-and-Invoicing-Guide-508.pdf) to understand what each line item entails, as well as a list of items and costs that cannot be included. Remember: a majority of the project’s budget should go towards Task 4.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Task 1** | **Task 2** | **Task 3** | **Task 4** | **Total** |
| **Personnel** |  |  |  |  |  |
| **Travel** |  |  |  |  |  |
| **Subcontractor(s)** |  |  |  |  |  |
| **Equipment/Materials** |  |  |  |  |  |
| **Overhead\*** |  |  |  |  |  |
| **Task Total** |  |  |  |  |  |
| **Agreement Total:** | | | | |  |

\*OPC does not pay more than 15% overhead on approved costs with an exception for UC/CSUs, in which OPC will pay no more than 25% overhead. Additional exceptions to allow for 25% overhead may be considered by OPC’s Executive Director in the case of research institutes with significant field programs.

### Budget Justification

The Budget Justification should explain the proposed allocation of funds to each task. Within the Budget Justification, explain your rationale for allocation of budget for each task and sub-task. This may involve some justification based on calculations, though, for the most part should provide a narrative explanation of expected costs and how the budget allocation supports accomplishment of the overall workplan.

## Section 7: Supplemental Documents

1. Project Team Resumes or Curricula Vitae
2. [Nonprofit Organization Pre-Award Questionnaire\*](https://www.opc.ca.gov/webmaster/_media_library/2022/07/OPC-Non-Profit-Organization-Pre-Application-Questionnaire%E2%80%A9and-Eligibility-Self-Screening-CNRA-OPC-010.docx)
3. Project Letters – Include any letters of support, commitment, etc.

\* Required for nonprofits only