

# Statewide Planning and Capacity Building Project Administrator FY 2022-23 Solicitation

## APPENDIX A: APPLICATION

### TEMPLATE I: Scope and Timeline Template



**Note:**

If you require this document in an alternate format or language, please contact Heather Choi at (279) 208-7556 or [heather.choi@arb.ca.gov](mailto:heather.choi@arb.ca.gov). TTY/TDD/Speech to Speech users may dial 711 for California Relay Service.

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The Scope and Timeline Template includes space for the Lead Applicant to provide a task and subtask breakdown; the Project Team members responsible for completing and supporting each task; Project deliverables; and a project schedule with milestones.

**Instructions:** Use the Scope and Timeline Template below to describe the project scope and timeline and submit with full application as part of Appendix A, Attachment 5 (Scope and Timeline Workplan). If selected for award, this or a modified version of this scope and timeline will be included directly in the grant agreement.

## I. Scope

**Instructions:** Starting with Task 2, update any bracketed instructions to fit the proposed project. Include one project category for each task. Continue this structure with project category for each task and use as many tasks and sub-tasks as needed to describe all the activities needed to implement the project.

Do not modify Task 1. Task 1 contains general grant management requirements.

### **Task 1. Grant management and reporting**

Administer the various tasks of the project including participation in meetings with CARB staff; development and implementation of the Project Workplan; record-keeping procedures; reporting procedures; and financial tracking and disbursements.

#### 1.1. Conduct meetings and communicate with CARB staff.

1.1.1. Kick-off meeting: The Grantee's and Subgrantee's key project personnel, in collaboration with CARB's Project Liaison, will plan, attend, and conduct a kick-off meeting with CARB staff within 45 days of the execution of the Grant Agreement, unless another timeframe is agreed upon by the CARB Project Liaison. The kick-off meeting will be virtual unless otherwise noted by the CARB Project Liaison. Topics for discussion may include, but not be limited to, the following:

- a. Upcoming project tasks, timelines, and milestones
- b. Opportunities for synergy between project tasks
- c. Content and format for quarterly reports, annual data collection, and final reports
- d. Next steps for and CARB review of Project Plan and public facing materials
- e. Schedule for ongoing coordination meetings
- f. Other items as necessary

#### 1.2. Coordination with the CARB Project Liaison to discuss project status.

Check-in meetings with CARB will be held twice per month or monthly, per the CARB Project Liaison, and a final meeting will be held at the conclusion of the project. At minimum, the Grantee's key project personnel will participate in

meetings with CARB staff. Other project partners may participate as needed or as requested by the CARB Project Liaison. Meetings will be virtual unless otherwise noted by the CARB Project Liaison. Additional meetings may be scheduled at the discretion of the CARB Project Liaison. Check-ins are the responsibility of the Grantee and should include:

- a. Agenda for the meeting with online meeting information provided prior to the meeting
- b. Discussion of project activities, deliverables, schedule, and milestones
- c. Discussion of any difficulties encountered since the last project update
- d. Concerns or questions requiring resolution from CARB
- e. Notification of any pending disbursement requests
- f. Scheduling the next project coordination meeting

1.3. Coordinate with the Project Team, including but not limited to Subgrantees, following the decision-making structure and the governance, legal, and financial relationships set out in the partnership structure. This must include:

- a. Executed agreements with all parties that will be compensated in return for specific work or information supplied as part of the scope of work.
- b. Regular communication with all Subgrantees, such as check-ins to keep track of progress made, troubleshoot issues encountered, and share support strategies. The Grantee is responsible for keeping CARB informed of progress on all projects, including those that are being led by one of the Subgrantees.
- c. Regular communication with all other project partners in a mutually agreed-upon format to share progress and receive feedback on project implementation and design.
- d. Participation in the Clean Mobility Equity Alliance.
- e. Coordination with other CARB projects (e.g., Access Clean California, Clean Mobility Options Voucher Pilot) where appropriate and as requested by CARB.

1.4. Develop the Project Implementation Plan. This plan will serve as a more detailed blueprint of the scope of the grant overall. It is meant to be a useful tool for the Grantee, CARB, and the Project Team to plan, understand, and refer to details of the work agreed upon. CARB must review and approve the plan before it is implemented. The Grantee, CARB, and Project Team should revisit the Project Workplan consistently over the grant term and update as needed within the bounds of the grant agreement scope. This plan will include multiple parts, including:

- a. Project schedule and deliverables
- b. Internal procedures, communication, and partnership structure plan
- c. Data collection, evaluation, and reporting plan
- d. Regional technical assistance process implementation plan

e. Partnership agreement

1.5. Project records. Establish and maintain records on each aspect of project implementation. Report on and assess progress throughout project implementation via a combination of metrics defined by CARB and metrics defined by the Grantee and the Planning, CMIS, and STEP awardees. The purpose of data collection and reporting is to document and assess the outcomes of this project, which may include better understanding the projects' impacts on capacity building and equity.

1.5.1. For all projects, track and report metrics, such as, but not limited to, the data types outlined in the solicitation on an annual basis.

1.5.2. Participate in third-party research projects as requested by CARB.

1.5.3. Identify data that are confidential and develop measures to keep these data confidential. For example, individuals' physical characteristics, residential address, wage and salary information, driver's license or state-issued ID number, and insurance policy number must be kept confidential.

1.5.4. Develop a systematic process and schedule to back up database(s) daily at a minimum.

1.5.5. Develop and enforce security measures to safeguard project database(s).

1.5.6. Store all records in a secured and safe storage facility that maintains confidentiality and provides fire and natural disaster protection.

1.5.7. Retain files during the term of the Grant Agreement plus three years after the grant term expires.

1.5.8. Transfer all project records to CARB once the project ends or three years after the grant term expires, whichever comes first.

1.6. Quarterly Status Reports: Submit numbered status reports accompanying grant disbursement requests to CARB at least quarterly but may submit monthly if necessary to justify more frequent disbursements with prior approval from CARB. Status reports must follow a specific format and include specific topics as requested by CARB.

1.7. Final Report: The Final Report must be submitted within 90 days of CARB receiving the draft Final Report or by March 15, 2027, whichever comes first. A draft Final Report is due to CARB within 30 days of project completion or by

December 31, 2026, whichever comes first. Final reports must follow a specific format and include specific topics as requested by CARB.

1.8 Document, track, and report expenditures, including expenditures of State funds and resource contributions.

**Task 1 Deliverables**

- Kick-off Meeting Materials (Agenda, Presentation, Meeting Notes)
- Project Coordination Meeting Materials (Agenda, Presentations, Meeting Notes)
- Project Implementation Plan (Initial and Periodical Updates)
- Quarterly Reports
- Disbursement Requests
- Draft and Final Report

**Project Team Member(s) Leading and Supporting Task**

- Task Lead: [Insert Names of Project Team]
- Supporting Task Implementation: [Insert Names of Project Team]

**Task 2. [Name of Task #2]**

[Provide a detailed narrative of the approach to the work, equity considerations and incorporation, and milestones by which progress can be measured.]

2.1. [Briefly describe first task.]

2.2. [Briefly describe second task.]

2.3. [Briefly describe third task.]

**Task 2 Deliverables**

[List achievable deliverables for this Task]

**Project Team Member(s) Leading and Supporting Task**

- Task Lead: [Insert Names of Project Team]
- Supporting Task Implementation: [Insert Names of Project Team]

**Task 3. [Name of Task #3]**

[Provide a detailed narrative of the approach to the work, equity considerations and incorporation, and milestones by which progress can be measured.]

3.1. [Briefly describe first task.]

3.2. [Briefly describe second task.]

3.3. [Briefly describe third task.]

**Task 3 Deliverables**

[List achievable deliverables for this Task]

**Project Team Member(s) Leading and Supporting Task**

- Task Lead: [Insert Names of Project Team]
- Supporting Task Implementation: [Insert Names of Project Team]

**II. Task Timeline**

**Instructions:** Complete the table below with an estimated start date and end date for each task and sub-task. Add or remove lines as needed until every sub-task in the scope above is included.

Task #	Approximate Start Date	Approximate End Date
Task 1	May 15, 2024	[Grant Term End Date]
Task 2.1		
Task 2.2		
Task 2.3		
Task 3.1		
Task 3.2		
Task 3.3		
Task XX		