

## Sample Scope of Work: Planning Grant Technical Assistance

### Overview:

This document contains the scope of work and minimum qualifications from a request for proposal that the California Department of Conservation (DOC) released for their Sustainable Agricultural Lands Conservation (SALC) Program. The TA providers are assisting eligible grantees in underserved communities in developing projects and grant applications for agricultural land conservation plans and policies.

### Scope of Work:

Contractor agrees to provide to the Department all services as described herein:

### Summary

Activities of the SALC TA Provider are intended to support the following:

- Conduct an outreach and partnership assessment focusing on disadvantaged and low-income communities to identify technical assistance opportunities; provider will work to identify at least one jurisdiction for a pilot project in which affordable housing and agricultural land conservation are addressed simultaneously.
- Select up to 5 communities to focus technical assistance efforts, including at least 1 for the housing/conservation pilot project mentioned above.
- Identify relevant community needs and assess how Planning Grants can provide direct, meaningful benefits to address those needs.
- Organize and implement training in agricultural land conservation principles and concepts for selected communities.
- Work collaboratively with selected communities to build local partnerships that foster comprehensive, community-driven grants.
- Help TA Recipients develop a Planning Grant application.
- For projects that are ultimately funded, assist with the implementation of the Planning Grant projects. Contractor will act as an independent, third party provider.

### Tasks

#### Task 1. Administrative Coordination, Meetings and Timeline

Contractor is responsible for all administrative coordination and shall manage its staff, if any. Contractor's staff shall be capable of undertaking all work assignments identified in the Scope of Work, required deliverables and reporting requirements. A kick-off meeting will be held. Attendees shall include relevant Contractor staff members, and relevant Department and SGC staff members. The parties will meet and confer regarding the agenda, but topics to be discussed may include clarifying: roles and responsibilities, work plan, reporting and invoicing. At the kick-off meeting, Contractor and Department shall agree upon a schedule for updates of

progress of the work plan. Updates may take the form of subsequent meetings, informal written updates or phone calls. At a minimum, a monthly check in meeting will be held.

#### Deliverables:

Deliverable 1.1 Participation in kick-off meeting.

Deliverable 1.2 Participation in check in meetings.

#### Task 2. Outreach and Partnership Assessment

Contractor will conduct an outreach and partnership assessment in the focusing on disadvantaged and low-income communities and areas that have not received significant CCI funding to identify eligible applicants with an interest in technical assistance.

Contractor will summarize the assessment findings into a Summary of Outreach and Partnership Assessment Findings. The Summary of Outreach and Partnership Assessment Findings document should include:

summary of findings detailing:

- local assistance opportunities
  - needs
  - efforts required to address those needs
- lists detailing:
  - those interviewed
  - entities initially considered and explored as potential TA Recipients
  - recommended Technical Assistance Recipients o stakeholders that may be engaged by the TA Recipient
- Additional information Contractor determines is appropriate

Contractor will submit a draft Summary of Outreach and Partnership Assessment Findings to the Department. Contractor, Department and SGC will meet to review the draft Summary of Outreach and Partnership Assessment Findings and agree upon up to 5 TA Recipients which will receive technical assistance pursuant to Tasks 3, 4, 5, and 6. Within 30 days of the meeting Contractor will submit a final Summary of Outreach and Partnership Assessment Findings.

#### Deliverables:

Deliverable 2.1 Draft Summary of Outreach and Partnership Assessment Findings.

Deliverable 2.2 Participation in meeting to review Draft Summary of Outreach and Partnership Assessment Findings and choose Technical Assistance Recipients.

Deliverable 2.3 Final Summary of Outreach and Partnership Assessment Findings.

Deliverable 2.4 Final List of TA Recipients.

#### Task 3. SALC Program Training

Contractor, the Department, and third-party technical experts will provide skills training to selected TA Recipients. Contractor will provide between 3 and 5 training sessions. Contractor will develop an in-depth curriculum to educate TA Recipients on the Planning Grants program,

focusing on those areas in need of development identified in the Outreach and Partnership Assessment. Contractor will be responsible for arranging meeting space for the program training workshops. Workshops maybe in person, if health and safety protocols allow, or virtual.

The training program will include information to build capacity and awareness of state resources to support infill development planning efforts (focusing largely on the AHSC program), how conserving agricultural land and open space can contribute to meeting statewide housing and conservation goals, engage stakeholders including those representing disadvantaged communities and socially disadvantaged farmers and ranchers. An overview of the proposed training content will be submitted for approval prior to any training sessions.

Contractor will present this curriculum in a time, place and manner which meets the needs of the TA Recipient, taking into account the Department's timeline for requesting Planning Grant applications. After the training session, Contractor will provide copies of the training session materials.

Each training session will include an evaluation tool for attendees to complete.

The following Post Training Compilation Materials will be prepared following each training session:

- list of training attendees including names, titles, organizational affiliation
- 4-10 observations considering the following areas:
  - usefulness of the training;
  - noteworthy participant questions, comments or ah-ha moments;
  - other observations and lessons learned; and
  - compilation of responses from training evaluation tool.

#### Deliverables:

Deliverable 3.1 Overview of Proposed Training Content.

Deliverable 3.2 Training Session Materials.

Deliverable 3.3 Post Training Compilation Materials

#### Task 4. Project Development Assistance

Contractor will assist TA Recipients to identify:

potential Planning Grant projects

- steps necessary to develop those potential projects into viable projects for which a grant application could be submitted
- next steps to developing those projects
- a timeline for completing those steps
- potential risks that could impede project success and potential adaptations to overcome risks.

Projects developed may include housing elements funded from the Department of Housing and Community Development Affordable Housing and Sustainable Communities Program.

Specific activities to complete this task will depend on the TA Recipient capacity and needs. Contractor will create a work plan for each TA Recipient. Department may require periodic updates to each work plan.

#### Deliverables:

Deliverable 4.1 Work plan for each TA Recipient.

Deliverable 4.2 Work plan updates.

#### Task 5. SALC Application Assistance

Contractor and the TA Recipients will identify potential projects for which a Planning Grant application will be prepared and submitted. Contractor will provide application assistance to TA Recipients so that a viable application is submitted. Specific activities to complete this task will depend on the capacity and needs of TA Recipients and shall include:

- As needed, update the work plans created in Task 4 for completing the Planning Grant application;
- Coordinate with TA Recipient staff and assist with preparing SALC Program grant pre-proposal application and materials; and
- Serve as a liaison between the TA Recipient and Department staff to answer questions and provide clarifying information.

#### Deliverables:

Deliverable 5.1 SALC pre-proposal.

Deliverable 5.2 SALC application.

Deliverable 5.3 Lessons learned from preparing SALC Application.

#### Task 6. SALC Grant Project Implementation

If the TA Recipients are awarded grants pursuant to the application submitted, Contractor will continue to work with those TA Recipients to implement the grant project. Specific activities to complete this task will depend on the TA Recipients' capacity and needs. Activities will at a minimum include maintaining communication with TA Recipient, creating a work plan detailing the steps to complete the grant projects, facilitating discussions regarding project scope among stakeholders including those representing disadvantaged communities and socially disadvantaged farmers and ranchers, as well as ongoing communication with Department staff regarding technical questions specific to the Planning Grants, as well as SGC staff regarding questions about the AHSC program, if applicable.

#### Deliverables:

Deliverable 6.1 Project implementation work plans.

Deliverable 6.2 Templates and materials utilized in application coordination activities.

Deliverable 6.3 Documentation of Application Submittals.

Deliverable 6.4 List of dates of meetings (by phone or in person) with TA Recipients.

### Task 7. Final Technical Assistance Report

Contractor will prepare a final report containing a summary of the process, findings, outcomes, lessons learned and best practices, and recommendations for future technical assistance efforts. Report should emphasize lessons learned from the perspective of the technical assistance provider, feedback for Department, and recommendations for expanding and improving technical assistance in the future.

### Deliverable:

Deliverable 7.1 Final Report.

### Work Plan and Schedule

The work plan and schedule submitted by the Contractor will be incorporated into the agreement.

### Contractor Evaluation

Within sixty (60) days of completion of the Agreement, the Contractor's performance will be evaluated by the Department. The Department shall document the performance of the Contractor in doing the work or in delivering the services or which the contract was awarded. If the Contractor did not satisfactorily perform the work or services specified in the contract, the Department shall place one (1) copy of the unsatisfactory form in the contract file and send one (1) copy of the form to the Department of General Services, Office of Legal Services (DGS/OLS) within five (5) working days of completion of the evaluation. Upon filing an unsatisfactory evaluation with DGS/OLS, the Department shall notify and send a copy of the evaluation to the Contractor within fifteen (15) days. The Contractor shall have thirty (30) days to submit a written response to the evaluation by the Department.

### Minimum Qualifications

In order for proposals to be considered responsive, Proposers must provide proof of meeting or exceeding the below minimum qualifications:

#### 1. Community engagement:

- (i) A minimum of five 5 years of experience with community engagement and partnership development, including support of meaningful cross-sector relationships; and/or
- (ii) A minimum of five 5 years of experience providing direct assistance to disadvantaged or low-income populations; and/or
- (iii) A minimum of five 5 years of experience providing community-scale capacity building activities that cultivate knowledge related to agricultural land conservation with the purpose of building longer-term understanding and a knowledge base around key concepts.

#### 2. Conservation:

- (i) A minimum of five 5 years of experience working on resource conservation planning projects or programs.

3. Writing Project Proposals:

- (i) Experience writing a minimum of two (2) proposals related to agricultural or working lands issues.