DOCKETED

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Document Title:	Presentation - Solicitation Cycle, Award, and Post-Award Process
Description:	Energy Research and Development Division's Information on Energy Research and Develpment Division's solicitation cycle, award, and post-award process that was presented at the 5/14 workshop.
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Solicitation Cycle, Award, and Post-Award Process

R&D funding opportunities

Visit the Energy Commission's EPIC and Natural Gas R&D websites

To find out information about solicitations that are currently available, visit our EPIC website at:

http://www.energy.ca.gov/contracts/epic.html

And our Natural Gas R&D website at:

https://www.energy.ca.gov/contracts/pier.html

Subscribe to the following listservers

To receive emails regarding activities and funding opportunities for the EPIC and Natural Gas R&D Program, you can subscribe to our ListServer at:

http://www.energy.ca.gov/research/upcoming_funding.html

Subscribing to the Opportunity ListServer will provide email notifications about all Energy Commission funding opportunities at:

http://www.energy.ca.gov/contracts/

Attend Public Workshops

Workshops for Investment Plans

How do I apply to a solicitation?

Obtain Solicitation Materials:

- Go to Energy Commission's funding website to obtain solicitation information and the application: http://www.energy.ca.gov/contracts/.
- Make sure you meet applicant and project eligibility requirements.
- Review any addenda to make sure you have the latest information on the solicitation.
- Review applicable terms and conditions.

Complete Application:

- Ensure that all solicitation requirements are met.
- Ensure that all required documents are in the specified format and order.
- Ensure that all responses are complete.
- Ensure that the application is signed by an authorized representative.

Submit Application:

- Ensure that the application is submitted via the Grants Solicitation System OR delivered to the Energy Commission's Contracts, Grants, and Loans Office by the date and time specified in the solicitation.

What is the general solicitation process timeline?

Application Development

Activity	Estimated Timeline
Solicitation Release • Solicitation materials available on website • Email ListServers are notified	Day 1
Pre-Application Workshop • Chance to ask clarifying questions verbally • Opportunity to network with other interested applicants to form project teams • Confirm deadline to submit written questions	2 weeks after the solicitation is released
Questions and Answers (Q&A) and Solicitation Addendum (if any) posted	1-2 weeks after Pre-Application Workshop
Application Due Date	6-8 weeks after solicitation is released

What is the general solicitation process timeline?

Evaluation and Award

Activity	Estimated Timeline
Screening and Scoring • Energy Commission Agreement Officer and Evaluation Committee review of administrative requirements • Eligible applications are scored by the Evaluation Committee • Clarification interviews are held if necessary • Applications are ranked by score • Top ranked applications are recommended for funding based on the amount available in the solicitation	2-4 months after the solicitation is released
Notice of Proposed Award (NOPA) Posting Date	4 months after the solicitation is released

What is the general solicitation process timeline?

Agreement Development and Execution

Activity	Estimated Timeline
Agreement Development and Review • Energy Commission staff prepare and finalize agreement documents • Legal and Budget Review • Submit to Recipient for review and signature	3 months following the NOPA posting date
Business Meeting Date	3 months after the NOPA is posted
Agreement Start Date	9-10 months after solicitation is released

NOTE: The timeline shown may change, depending on the number of applications received and other factors impacting the review and approval process.

What will I learn at the workshop?

Potential applicants should attend the workshop in-person or participate through WebEx or the phone-in option, on the date and time specified in the solicitation.

This workshop allows interested parties to:

- Receive an overview of the solicitation's purpose and requirements

- Ask clarifying questions at the pre-application workshop

- Network with others to form project teams

Application Requirements

Applications must be submitted in the format and order specified in the solicitation materials. Specific requirements may vary for each solicitation.

Examples of Required Submittals - Application will be rejected if it fails to comply with the requirements specified in the solicitation materials or if any of the following are missing or incomplete:
- Application Form (must be signed by an authoritative representative)
- Executive Summary
- Fact Sheet
- Project Narrative (addresses scoring and screening criteria item by item)
- Project Team Form/Resumes
- Scope of Work
- Schedule of Products and Due Dates
- Budget
- CEQA Compliance Form
- Reference and Work Product Form
- Contact List
- Commitment and Support Letters

How will my Application be Evaluated?
Application Scoring

Stage Two: Application Scoring

Applications that pass all Stage One Application Screening criteria will be subject to a technical scoring by the Evaluation Committee.

Application Scoring Criteria

1. Technical Merit and Need
2. Technical Approach
3. Impacts and Benefits for California IOU Ratepayers
4. Team Qualifications, Capabilities, and Resources
5. Budget and Cost-Effectiveness
6. EPIC Funds Spent in California
7. Ratio of Direct Labor and Fringe Benefit Rates to Loaded Labor Rates
8. Match Funding (if applicable)
9. Disadvantaged Communities
10. California Based Entities (if applicable)

Keys to a Successful Proposal

Things to think about

1. Remember to read the Grant Funding Opportunity requirements and explicitly answer all questions.

2. Treat the application process using game theory. The object is collect the most points. So remember to collect all the easy points (money spent in CA, match funding %, etc.).

3. Make sure that the site location is secure, and have a backup location in mind.

4. Request a debriefing.

Common Proposal Mistakes

1. Sites falling through late in the proposal process.

2. Not checking for simple errors (late submittal, not signing docs, not including all docs).

3. Assuming the scoring team knows everything you know. The scorers are all technically proficient but will not assume if you have gaps in your narrative. Each report must be complete.

Agreement Development

The recipient(s) recommended for funding will be contacted by the Energy Commission Agreement Manager (CAM) to develop the application into a grant agreement:

Scope of Work (SOW):

- Finalize the SOW as stated in the application.
- The scope of the project cannot change, but edits are allowable to better clarify tasks, goals, and objectives.
- Product due dates may be revised to reflect the time required for agreement approval.

Budget:

- Finalize the budget as stated in the application.
- No new costs, rates, or classifications may be added.
- Minor adjustments that do not increase the total grant amount may be made.

CEQA:

- Energy Commission review of CEQA

Signed Resolutions:

- Required for government agency recipients to show authorization for the agency to enter into the agreement.