



INSTRUCTIONS for the SCOPE OF WORK and TABLE OF DELIVERABLES

The Scope of Work (SOW) and Table of Deliverables (TOD) should be prepared following the format below. **The tasks in the SOW and TOD, the Task Budget, and the Line-Item Budget must align. Also complete the Table of Deliverables at the end of this document for either a Tier 1 or Tier 2 Project, as applicable.**

Title: The Scope of Work should be entitled “Scope of Work”. Include the Project Title on each page. The Table of Deliverables should be titled “Tier 1 -Table of Deliverables” or “Tier 2 – Table of Deliverables”, as applicable.

Formatting: The formatting requirements are: **PDF format**, Letter (8.5” x 11”) size paper; Single-spaced or wider; standard font - Size 11 or larger; and one inch (1-inch) margins, except for the maps. Use page numbers and number all tables.

Organization: The information should be organized in a manner outlined in the instructions below and labeled as appropriate. Use section titles as follows:

Scope of Work

Table of Deliverables

Submission: Complete the SOW and TOD as a single document and upload it into the On-Line Line Grant Application (OLGA) system.

SOW and Table of Deliverables: Provide a detailed, concise, and specific SOW, suitable for use in preparing the Grant Agreement:

1. Briefly state the purpose for which the funding is being requested.
2. Write the SOW as a series of tasks. Describe the specific purpose of each task, including details of how, when, and/or where the task will be accomplished.
3. For implementation projects, include all California Environmental Quality Act (CEQA) related tasks, and identify permits needed; this information should be captured within the Environmental Compliance section in OLGA. A project under CEQA is any project that is undertaken by a public agency or a private activity which must receive some discretionary approval (meaning that the agency has the authority to deny the requested permit or approve with conditions) from a government agency due to either a direct physical change in the environment or a reasonably foreseeable indirect change in the environment.
4. Identify how the progress on each task will be tracked (i.e., deliverables, and their expected completion date).
5. Include a task for preparing the project’s draft and final reports.
6. Complete a TOD, see template at the end of this document for a Tier 1 or a Tier 2 Project. Include interim dates for the SOW tasks, verses simply stating the grant term end date, for DBW to track progress. For Tier 2 Projects, also add representative outreach events (three outreach events are required for Tier 2 Projects).



Scope of Work (Sample)

Purpose

This section includes a brief purpose of the Project. The Scope of Work (SOW) should be laid-out in logical, sequential steps with tasks and subtasks. The objective of this format (sequential tasks and subtasks) is to develop the SOW consistent with the format required in the Grant Agreement.

The purpose of this project is to improve upon the existing prevention program in the reservoir. The project includes the development and adoption of a mitigated negative declaration, the installation of a decontamination unit, mechanical arms, reciprocal banding program; staff inspection process at Paradise Marina, and an assessment of the existing Prevention Program. NEPA is not required. No permits are anticipated.

Example for a Tier 1 Project:

Task 1.0 Prepare a Prevention Plan that meets CDFW requirements in Fish and Game Code, Section 2302, and California Code of Regulations, Title 14, Section 672.1(b)). Secure in-house (*or consultant*) staffing to prepare the plan

- 1.1 Provide a draft of the Prevention Plan to the California Department of Fish and Wildlife (CDFW) Regional Scientist for review and discussion, at the required time-frame listed in the Table of Deliverables

Deliverables: Draft Prevention Plan (by end of Year 1), Final Prevention Plan (by end of grant period), Prevention Plan acceptance letter from CDFW (by end of grant period)

Task 2.0 Conduct early-detection mussel monitoring

Deliverables: Provide monitoring data to DBW at required time-frames listed in the Table of Deliverables.

Task 3.0 Final Reporting

Deliverables: In addition to providing the final CDFW-accepted Prevention Plan to DBW, provide the other requirements as listed in the Table of Deliverables, including but not limited to, the draft and final report required by this grant.

Example for a Tier 2 Project:

Task 1.0 Installation of a decontamination station and mechanical arms at North Marina

- 1.1 Provide DBW with appropriate CEQA documentation (*note to applicant: CEQA work is not grant funded; this is a two-year grant term therefore for larger projects the CEQA process is expected to be complete or significantly underway, and projects are, or are nearly, shovel-ready*)
- 1.2 Collect bids from manufacturers for a self-contained, free standing mobile decontamination and wastewater recycling system unit.
- 1.3 Purchase the most appropriate unit according to the 2.1 task specifics.
- 1.4 Prepare the site for installation of decontamination unit including grading and paving the decontamination station area.



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(Example for a Tier 2 Project Continued)

- 1.5 Install the decontamination unit, and connect all electrical and water supplies to the unit.
- 1.6 Install two mechanical arms at ramps.

Deliverables: Photos of the installed unit and decontamination area, any best management practices/mitigation strategies, evidence of insurance and maintenance on the units and arms and summary of the operation of the decontaminating watercraft.

Task 2.0 Implement watercraft inspection training at the inspection station at the Paradise Marina

- 2.1 Employ two full-time and four part-time staff to conduct inspections.
- 2.2 Provide Watercraft Inspection II training to the new staff.
- 2.3 Provide hand-held devices to the staff to access and record watercraft information into the watercraft tracking database.
- 2.4 Provide the inspection equipment and material (handheld device, tag and stickers for banding etc.).
- 2.5 Install a mechanical arm at the ramp.

Deliverables: Training on inspection protocols, copies of the staff training certification, photos and purchase information for the control arm.

Task 3.0 Reciprocal banding program

- 3.1 Implement the reciprocal banding program at Paradise Marina.
 - 3.1.1 Inspect, decontaminate, and quarantine vessels for dreissenid mussels. Once cleared, place a wire security band between the trailer and watercraft.
- 3.2 Implement the reciprocal banding program at South Marina using the same process as the Paradise Marina.

Deliverables: Record the number of recipients using the reciprocal band program and submit a photo of the security band.

Task 4.0 Complete the Final Project Report

Details of the final report should include but are not limited to: mussel prevention measures (installation of equipment, construction, inspection, monitoring, outreach and education, etc.); description of the project, performance, success, and shortcomings; lessons learned; project cost and actual cost of the project; and identify next steps. Consult the grant agreement for the requirements.

Deliverables: Final Project Report



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Table of Deliverables:

Include the appropriate Table of Deliverables, for either Tier 1 or Tier 2.

For Tier 1 Planning and Assessment Projects, use the following Table of Deliverables and complete Part A, Section 2, which is highlighted yellow for your convenience.

TIER 1 - TABLE OF DELIVERABLES

PART A – SCOPE OF WORK – WORK TO BE PERFORMED			
SECTION 1 – GENERAL COMPLIANCE REQUIREMENTS			
Item	Description	Due Date	Information Reporting
1.	Final Resolution, if the applicant has a governing board. (Note: A draft Resolution, at a minimum, is required at the application stage. If the applicant does not have a governing board, a final Letter of Approval is required at the application stage.)	Prior to grant execution	Provide to DBW Grant Administrator
2.	Evidence of Insurance with endorsement	Prior to grant execution	
3.	Contractor Certification Clauses form (CCC 04/2017)	Prior to grant execution	
4.	Early-Detection Mussel Monitoring Data: Report data twice during the grant term. (Refer to the Grant Agreement Exhibit A, Section A, subsections 4-5 for the frequency of data collection and protocol.)	Due date is the same as the Annual and Draft Final Project Reports	Provide with the Annual Report Provide with the Draft Final Project Report
5.	Public Agency Approvals, Entitlements or Permits, as applicable	As needed	To DBW Grant Administrator
6.	Provide a draft of the Prevention Plan to DBW and CDFW Regional Staff for their review	Due date is the same as the Annual Report	Provide to DBW Grant Administrator and to CDFW Regional Staff
SECTION 2 – PROJECT SPECIFIC REQUIREMENTS			
Project Tasks from Scope of Work (Applicant to insert additional task lines as needed.)			



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Item	Description	Due Date	Information Reporting
1.	Task 1:	<i>Applicant to insert estimated Month, Year</i>	Quarterly Progress Report
2.	Task 2:	<i>Applicant to insert estimated Month, Year</i>	
3.	Task 3:	<i>Applicant to insert estimated Month, Year</i>	
4.	Task 4:	<i>Applicant to insert estimated Month, Year</i>	

PART B – INVOICING, BUDGET DETAIL, AND REPORTING PROVISIONS

SECTION 1 – INVOICING

Item	Description	Due Date	Information Reporting
1.	Quarterly Payment Request (If a Payment Request is being submitted, it must be submitted with a Quarterly Progress Report.)	Provide with Quarterly Progress Reports	Provide to DBW Grant Administrator
2.	Final Payment Request/Final Invoicing	(DBW to insert)	

SECTION 2 – REPORTS

Item	Description	Due Date	Information Reporting
1.	Quarterly Progress Reports	(DBW to insert)	Provide to DBW Grant Administrator
2.	Annual Report	(DBW to insert)	
3.	Draft Final Project Report	(DBW to insert)	
4.	Final Project Report	(DBW to insert)	
5.	Final Project Summary	(DBW to insert)	
6.	Final Project Inspection and Certification(s): <ul style="list-style-type: none"> • Project Completion Certification • Contractor’s Release Form, if applicable 	(DBW to insert)	



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For Tier 2 Implementation Projects, use the following Table of Deliverables and complete Sections 2 Outreach Events and Project Tasks from Scope of Work, which is highlighted yellow for your convenience.

TIER 2 - TABLE OF DELIVERABLES

PART A – SCOPE OF WORK TO BE PERFORMED			
SECTION 1 – GENERAL COMPLIANCE REQUIREMENTS			
Item	Description	Due Date	Information Reporting
1.	Final Resolution, if the applicant has a governing board. (Note: A draft Resolution, at a minimum, is required at the application stage. If the applicant does not have a governing board, a final Letter of Approval is required at the application stage.)	Prior to grant execution	Provide to DBW Grant Administrator
2.	Evidence of Insurance with endorsement	Prior to grant execution	
3	Contractor Certification Clauses form (CCC 04/2017)	Prior to grant execution	
4.	Early-Detection Mussel Monitoring Data: Report data twice during the grant term. (Refer to the Grant Agreement Exhibit A, Section A, subsections 4-5 for the frequency of data collection and protocol.)	Due date is the same as the Annual and Draft Final Project Reports	Provide with the Annual Report Provide with the Draft Final Project Report
5.	Inspection/decontamination, ramp monitor contacts data submission to DBW (this is only required when DBW is funding these activities)	Due date is the same as the Annual and Draft Final Project Reports	
6.	Copy of final CEQA/NEPA Documentation, as applicable	Before Project Start Date	To DBW Grant Administrator
7.	Public Agency Approvals, Entitlements or Permits, as applicable	As needed	
8.	Photo Proof of DBW Funding Sign Installed	Due date is the same as the Annual Report	Provide with the Annual Report



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9.	If the Project included outreach materials and/or media buys (such as print, digital, social media, TV, or radio ads) the information must be submitted to DBW for review prior to purchase.	Draft materials are due no later than the Draft Final Project Report	Provide to DBW Grant Administrator
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SECTION 2 – PROJECT SPECIFIC REQUIREMENTS

Outreach Survey
 (Applicant will develop a survey to gauge public knowledge of QZ mussels.)

Item	Description	Due Date	Information Reporting
1.	Survey Plan (a template is available) Survey results	The approved survey plan is due with the Annual Report Due date is the same as the Draft Final Project Reports	Provide in the Annual Report Provide in the Draft Final Project Report

Outreach Events
 (Example of representative outreach events the applicant will participate in to educate public. Applicant to insert description of each event.)

Item	Description	Due Date	Information Reporting
1.		<i>Applicant to insert estimated Month, Year</i>	Quarterly Progress Report, as applicable, and Draft Final Project Report, as applicable
2.		<i>Applicant to insert estimated Month, Year</i>	
3.		<i>Applicant to insert estimated Month, Year</i>	

Project Tasks from Scope of Work
 (Applicant to insert tasks and add additional lines as needed.)



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Item	Description	Due Date	Information Reporting
1.	Task 1:	<i>Applicant to insert estimated Month, Year</i>	Quarterly Progress Report
2.	Task 2:	<i>Applicant to insert estimated Month, Year</i>	
3.	Task 3:	<i>Applicant to insert estimated Month, Year</i>	

PART B – INVOICING, BUDGET DETAIL, AND REPORTING PROVISIONS

SECTION 1 – INVOICING

Item	Description	Due Date	Information Reporting
1.	Quarterly Payment Request. (If a Payment Request is being submitted, it must be submitted with a Quarterly Progress Report.)	Provide with Quarterly Progress Reports	Provide to DBW Grant Administrator
2.	Final Payment Request/Final Invoicing	(DBW to insert)	

SECTION 2 – REPORTS

Item	Description	Due Date	Information Reporting
1.	Quarterly Progress Reports	(DBW to insert)	Provide to DBW Grant Administrator
2.	Annual Report	(DBW to insert)	
3.	Draft Final Project Report	(DBW to insert)	
4.	Final Project Report	(DBW to insert)	
5.	Final Project Summary	(DBW to insert)	
6.	Final Project Inspection and Certification(s): <ul style="list-style-type: none"> • Project Completion Certification • Contractor’s Release Form, if applicable 	(DBW to insert)	