

### Sample Task Lists

SAMPLE TASK LIST #1			
SUBSTANTIVE ITEMS			
TASK	DESCRIPTION	WHO	STATUS
Project Narrative	NOTE: all items (except SF424 forms) must not exceed 80 pages when printed out via Grants.gov. 12 point font, 1-inch margins, times new roman font for narrative.	Aaron	
Project Abstract	Max: 4,000 characters <i>Use the form in Grants.gov Workspace</i>	Aaron	
Budget Narrative		Aaron	
Budget	To be created in "budget sandbox" and transferred over to SF-424A form	Aaron/ Steve/ Kathy	
ADMINISTRATIVE ITEMS & REQUIREMENTS			
TASK	DESCRIPTION	WHO	STATUS
Attachment 1 - Work Plan	See NOFO for detailed requirements	Aaron	
Attachment 2 - Consortium Membership	See content requirements for this section (to be provided in Table format) on page 21 of NOFO	Kathy	
Attachment 3 - Letter of Commitment	All consortium members reflected in the proposed work plan, including the applicant organization, must sign and date a <b>single</b> letter of commitment ( <b>Attachment 3</b> ) that delineates the expertise, roles, responsibilities, and commitments of each consortium member. See page 21 of NOFO for details	Kathy	
Attachment 4 - Organizational Chart	Provide a one-page organizational chart that clearly depicts the relationships and/or hierarchy among all consortium members participating in the project.	Kathy	
Attachment 5 - Staffing Plan	Provide a detailed and clear staffing plan that includes the following information for each proposed project staff member... this seems like a substantial document. See page 22 of NOFO for details...  (1) staffing plan and provide a justification for the plan that includes education and experience qualifications and rationale for the amount of time being requested for each	Kathy	

	<p>staff position.</p> <p>(2) Position descriptions that include the roles, responsibilities, and qualifications of proposed project staff must be included in the Attachment <i>specified in the NOFO</i>.</p> <p>(3) Should describe your method for ensuring that only actual work performed will be charged to the award and how that method meets federal cost principle requirements under § 75.430 Compensation—personal services.</p>		
Attachment 6 - Staff biosketches	See page 23 of NOFO for details	Kathy	
Attachment 7 (if applicable) - <i>Other RCORP Awards</i>	See page 26 of NOFO	Kathy	
Attachment 8 - EIN Exemption form (if applicable)		Kathy	
<i>Attachment 9 - Exceptions to Service Delivery Sites</i>	For non-rural areas (I think not applicable)	Kathy	
Attachments 10-15 - Optimal	Could include ICRA, letters of support from non-consortium	Kathy	
Key Contacts Form	Not sure where I saw this...	Kathy	
Indirect Cost Rate Agreement		Kathy	
Grants.gov Lobbying Form	I believe this is completed in Workspace	Kathy	
SF-LLL	I believe this needs to be downloaded and uploaded	Kathy	

**Information we need**

- 1.
- 2.

**Programmatic Questions**

1. ??
2. ??

SAMPLE TASK LIST #2			
SUBSTANTIVE ITEMS			
TASK	DESCRIPTION	WHO	STATUS
Table of Contents	Includes all attachments, etc. (does not count toward 20 page count). Attach under "Other Attachments" Label " <b>Table of Contents</b> "	Aaron	
Project Narrative	No more than 20 pages. Must be named "Project Narrative." 12-pt font including Work Plan tables (other tables may be 10-pt)	Aaron	
Works Cited		Aaron	
Project Abstract	1 page	Aaron	
Budget Narrative labeled "Budget Narrative"		Aaron	
Budget	To be created in "budget sandbox" and transferred over to SF-424A form	Aaron/ Bill	
ADMINISTRATIVE ITEMS & REQUIREMENTS			
TASK	DESCRIPTION	WHO	STATUS
Report on Programmatic, Budgetary and Commitment Overlap	The document should be labeled: "Report on Programmatic, Budgetary, and Commitment Overlap."  See page 21 of RFA for details. If there is no overlap, the "report" can briefly state this.	Aaron/ Bill	
Risk Questionnaire (nothing burger)	CDC form - can link to outside policies if they are clickable. <u>Note:</u> They ask questions about staffing (i.e. do you have a CFO, etc.) "along with supporting documentation" Label (if any) like: Risk Questionnaire Supporting DDocuments_Procurement (or whatever)	Bill	
SF-424 Form	Main application form	Bill/ Aaron	
SF-424A	Budget (part of above form)	Bill/ Aaron	
Indirect Cost Rate Agreement	Must be labeled "Indirect Cost Rate" ... if you have one	Bill	

Collaboration Letters - one from <b>each association</b> or other org that is committing to work for the project and from <b>Citizen Group</b> .	letters of commitment or MOUs/MOAs from key collaborators. These are <i>not</i> letters of support. Letter from Citizens Group's is most important since they have a large chunk of budget. Should include the SOW and detailed breakdown of their fee.	Bill	
Resumes/ CVs of key personnel	Stan, Bill and perhaps 1-2 others who will be highly involved in project. Combine all into a single document and label attachment "Resumes."	Bill	
Organizational Chart	"miscellaneous attachment" and labeled "Organizational Chart."	Bill	

**Information we need**

- Will add as needed...
- List of collaborators (up to 10 we can have letters from)

**Programmatic Questions**

- What activities will align with Strategies 1-4 starting on page 8 of the RFA?

**Administrative questions**

- What is the allowable indirect cost rate?
- Are there any budget limitations in regard to "data collection" and "infrastructure development?"

SAMPLE TASK LIST #3			
SUBSTANTIVE ITEMS			
TASK	DESCRIPTION	WHO	STATUS
Narrative	20-pages, single space, 12-pt font. Narrative guideline provided. Includes Work Plan and Budget	Aaron	
Narrative - Supporting Documentation	Not clear yet what this consists of	John/ Aaron	
Environmental Survey	Extensive document that requires narrative responses, supporting documentation (i.e., aerial map(s)), and verification of certain things	John	
Certifications document	Document that needs signature	John	
Source documentation	<b>Resumes</b> to support key personnel, construction labor, and operational workforce; I think it may be <u>only</u> resumes that are needed.	John	
Contact RCBS State Energy Coordinator	To share details about proposed project and gain any useful insight they may be able to provide: Tonya Mosley, USDA Rural Development; (502) 834-4031;	John	

	tonya.mosley@usda.gov		
Letters of commitment from distributors of lime and gypsum	Goal: letters from <u>all</u> of your distribution partners (who also buy your product, I assume) indicating they will purchase materially-all of the additional amendments that you produce, after expansion.	John/ Bill	
Letter of commitment from NPK fert distributors/ buyers	I added this because as we discussed the railcar loader will allow you to transport to new markets. You should have substantiating documentation for this this, so letters from existing or new distributors of your NPK indicating they can sell MORE (if you could get it to them by rail) is essential.		
Letter(s) of commitment from mine(s) who supply raw materials	... And suppliers of binders and whatever else you may need... these letters should state that they can provide the extra xxxx tons/ month of materials you will need to expand	John	
EPA Communications	If you have anything formal from the EPA stating that your existing permit can be modified... include this communication	John	
Clark County Communications	If you have any letters from the County regarding permits, zoning, etc. we should include those communications as well	John	
Design and construction documents	Not clear yet what, specifically, should be included. Most likely prelim cost estimates and design quote from GC	John	
<i>Pro forma</i> income statements	Suggest to include 2-year <i>pro forma</i> statements, projecting sales/ production after completion of the project, possibly create as a sensitivity analysis (choose one variable such as: price, production capacity)	John/ Aaron	
<b>ADMINISTRATIVE ITEMS &amp; REQUIREMENTS</b>			
<b>TASK</b>	<b>DESCRIPTION</b>	<b>WHO</b>	<b>STATUS</b>
SF424	Cover page, performance site locations, other info, senior/ key personnel - this info can be completed within Workspace	John	
SF424-C	Budget form for construction projects (also available in Workspace)	John	
SF424-D	Assurances for construction programs (available in Workspace)	John	
Form AD-2016	Form related to compliance with Civil Rights Laws	John	
SF-LLL	Disclosure of lobbying activities	John	
Financial viability package	Includes: 1. Business plan 2. 3 years of historical balance sheet and income	John	

	statements 3. Current balance sheet and income statements (w/in 90 days)		
Matching fund documentation	40%		
<b>Setup Grants.gov account/ Workspace</b>	<b>Will need to register with SAM and DUNS as well, if not done already.</b>	John	

**Questions - administrative**

- Can/ should we include letters of commitment from buyers to demonstrate demand for increased production?
- May we use font smaller than 12 points in tables and figure, as long as font is clearly legible?
- What, specifically should be included for “Design and construction documents?” (quotes, engineering, permitting info, etc.)?
- What type of “performance metrics” is the USDA interested in?
  - Sales?
  - Production?
  - Uptime?
  - Construction schedule???

**Questions - programmatic**

- Will matching funds be used? If so, what is the source?
- Are your financials good for past 3 years good? If not, will be an issue.
- Have you already completed construction/ design plans?
- Have you completed a business/ marketing plan for the business, taking into account the expanded production?
- When would your new plant be operational and providing product to the market? If before 2024, it may make sense to apply for the November deadline.
- ***There IS a benefit to applying for November deadline!***