




APPLICATION WORKSHOP

How to Apply to the Proposition 1 2017
Proposal Solicitation
June 12, 2017



Application Workshop

1. Overview of Online Application System
2. Tips for Writing Complete Grant Proposals
3. Application Walk-through
4. Questions



System for Online Application Review (SOAR)

- Website: <http://soar.resources.ca.gov>
- User Manual: https://soar.resources.ca.gov/LoginLinks/Soar_UserManual.pdf
- System requirements:
 - Internet Explorer (version 6.0 or higher)
 - Computer monitor resolution at least 1024 x 760
 - Enable pop-ups
 - Use a personal computer (PC), MACs not recommended



Create a SOAR Account



Create a SOAR Account

Creating a SOAR Account is a 2-step process

1st Step: Search for Organization Name

2nd Step: User Registration

Create a SOAR Account

1st Step – Search for Organization Name

Search for Organization

Organization Name: River

Sort By: Organization Name

Search Back Create New Organization

Click

Type any part of the organization name

Create a SOAR Account

Organization Name Found in SOAR

Search for Organization

Organization Name: 


Sort By: ▼

Organization Name	Department
City of Pico Rivera	Water Resources
Rivera's WQ Firm ← Click to go to Step 2	WaterFalls

Create a SOAR Account

Organization name is not found in SOAR

Search for Organization

Organization Name: 

Sort By: ▼

← **Click**

Organization Name	Department	Address
No Organization Records Found		

Create a SOAR Account

Creating New Organization Record

Organization Details

Organization Name:	HowToVideoSeries	← Organization Name & Division
Division or Branch:		
Mailing Address:	1001 I Street	← Mailing Address
Mailing City:	Sacramento	
Mailing State:	CA	
Mailing Zip:	95814	
Type of Organization:	State Government	← Organization Type
Federal Tax Id Number:	111111111	← Federal Tax ID
DUNS Number:	999999999	

Previous Step Next Step

Click ↑

Create a SOAR Account

2nd Step – User Registration

User Account Details

Organization:		
Prefix:	Mr.	(Mr., Ms., Dr., etc.)
First Name:	John	← Name
Middle Name:		
Last Name:	Smith	
Title:	Project Director	← Title
Phone:	444-444-4444	← Phone Number
Fax:	333-333-3333	← Fax Number
Email:	jsmith@howtovideoservices.ca.gov	← Email Address
Confirm Email:	jsmith@howtovideoservices.ca.gov	
Subscribe to Email Alerts?:	Yes	← Email Alerts
User Name:	JSmith	← Username/Password
Password:	••••••	
Security Question:	Favorite sport	← Security Question/Answer
Security Answer:	Basketball	

Create User Account Back to Organization

Click ↑

SOAR Help Desk

(916) 653-3138

SOAR_ADMIN@resources.ca.gov

Monday – Friday from 9AM to 4PM

SOAR: How to Start an Application

Main Menu

The Main Menu allows the user to start a new application, work on applications in progress, view submitted and/or processed applications, or edit the user and/or organization profiles.

Applicant Menu

- Start an Application → [Start a New Application](#): Start a New Application!
- [Copy an existing application into a new application](#): Copy an existing application into a new application!
- Existing Applications:
 - [Active Applications](#): View/edit Applications with a status of In Progress (Not Submitted).
 - [Submitted Applications](#): View Applications with a status of Submitted or Assigned (for Review) ← Submitted Applications
 - [Processed Applications](#): View Applications which were either recommended for funding, awarded funding, or declined funding.
 - [Inactive Applications](#): View/edit Applications that were not submitted and the deadline has passed
- Update User Profile → [Update User Profile](#): Edit contact information, security question/answer.
 - [Update User Password](#): View and edit password.
 - [Update Organization Profile](#): Submit a request to update information for Organization ← Update Organization Profile
- FAQs → [Resources](#): Available resources to assist in the successful completion of a SOAR application.
 - [Frequently Asked Questions \(FAQs\)](#): Answers to frequently asked questions.
 - [User Manual](#): Applicant user manual. ← User Manual
 - [Contact Us](#): If you need technical assistance, please contact the SOAR Help Desk.
 - [Funding Program Resources](#): A list of the State agencies using SOAR and their funding program webpages.

SOAR: How to Start an Application

System Disclosure & Usage Recommendations

System Disclosure

SOAR was designed and tested for use on a personal computer (PC) using Internet Explorer (version 6.0 or higher). The use of a Macintosh (Mac) or other web browsers may impact the ability to successfully save information, navigate within SOAR, upload attachments, or submit an application.

The following is a list of recommendations when using SOAR.

Usage Recommendations	Check Box
Use web browser Internet Explorer (version 6.0) or greater.	<input type="checkbox"/>
Save work often - System times out after 90 minutes of inactivity.	<input type="checkbox"/>
Disable pop-up blocking software.	<input type="checkbox"/>

Check ALL boxes

Click →

Note: Each time a new application is started, the user will need to read/check the usage requirements.

SOAR: How to Start an Application

Select Applicant Organization

Select Applicant Organization

Please identify the Applicant Organization for the application started by the selecting either OPTION 1 or OPTION 2 below. If the Applicant Organization selected is later determined to be incorrect, contact the SOAR Help Desk to have the correct Applicant Organization associated with the project.

OPTION 1: Applicant Organization = Submitting Organization

- The Applicant Organization for this project is: "Rivera's WQ Firm - Waterfalls ". The Applicant Organization is the same as the Submitting Organization. Press the OPTION 1 button to move to the next step.

← **Click if you work for the Applicant Organization**

OR

OPTION 2: Applicant Organization ≠ Submitting Organization

- The application is being submitted on behalf of another organization (the Applicant Organization). The Applicant Organization is different from the Submitting Organization. Press the OPTION 2 button to search for and select the Applicant Organization for this project.

← **Click if you are a consultant submitting on behalf of the Applicant**

SOAR: How to Start an Application

Select **"CDFW – 2017 Prop 1 Watershed Restoration & Delta Water Quality and Ecosystem Restoration"** from List of Active RFPs

Active RFPs

The following is a list of active Request for Proposals (RFPs). These RFPs are currently accepting applications. Select the desired

Please refer to the RFP, Guidelines, Solicitation Notice, or other information provided (by the funding program or funding organization)

RFP Title
Environmental Enhancement and Mitigation Program 2016/17 Grant Cycle
CDFW - 2017 Prop 1 Watershed Restoration & Delta Water Quality and Ecosystem Restoration
Museum Grant Program - May 2017

Click

SOAR: Completing the Application

- Applicant Checklist
- Attachments
 - Only accepted through electronic submission on SOAR
 - Each file cannot exceed 25 megabytes
 - Follow specified naming conventions for file names (see Applicant Checklist)
- Timer (90 minutes)
 - Save Often – Resets Timer
- Do not Submit Until You are Certain Complete



Proposal Components

- SOAR Application
- Attachments
- Links to SOAR, attachment forms and templates, and Word version of Application (Appendix A) online
 - <https://www.wildlife.ca.gov/Conservation/Watersheds/Restoration-Grants/News>

SOAR Application

The screenshot shows the top portion of the SOAR application. At the top, there is a header for "General Information" followed by instructions: "The Application is organized into different tabs. Each tab should be completed according to the instructions." Below this are "SAVE" and "PREVIEW/SUBMIT" buttons. A text input field contains "PIN 515 - Enter Project title here - IN PROGRESS". Below the input field is a horizontal navigation bar with tabs: "General Information", "Project Budget", "Funding", "Project Management", "Legislative Information", "Questionnaire", "Attachments", and "Status".

Proposal Identification Number (PIN), Project Title, & Status

Application Tabs

SOAR Application

■ Application Questionnaire

Main Menu > Application Questionnaire

Questionnaire

The Application is organized into different tabs. Each tab should be completed according to the instructions provided. All tabs should be completed before submitting the Application.
SAVE: Pressing this button will save the information entered thus far.
PREVIEW/SUBMIT: Pressing this button will allow you to preview/submit the information entered thus far.

89:40 Session timer in minutes and seconds. Save your work before it times out.

PIN 515 - Enter Project title here - IN PROGRESS

General Information | Project Budget | Funding | Project Management | Legislative Information | **Questionnaire** | Attachments | Status

The Questionnaire tab allows the applicant to respond to questions that are specific to the Project.
Please note: Save your work periodically. Above is a session timer that is re-set each time the SAVE AS WORK IN PROGRESS button is clicked. If the session timer expires, unsaved work will be lost.
Answer all of the questions.

Questionnaire - Current Phase

Table of Contents

Scroll down or click on the links below to navigate between Application sections

- [Section 1: Summary Information](#)
- [Section 2: Location Information](#)
- [Section 3: Landowners, Access, and Permits](#)
- [Section 4: General Requirements](#)
- [Section 5: Project Narrative, Monitoring, and Long-Term Management](#)
- [Section 6: Qualifications and Conflict of Interest](#)
- [Section 7: Project Budget](#)

Application Session Timer

Navigation Links

SOAR Application

■ Attachments Tab

Main Menu > Attachments

Attachments

The Application is organized into different tabs. Each tab should be completed according to the instructions provided. All tabs should be completed before submitting the Application.
PREVIEW/SUBMIT: Pressing this button will allow you to preview/submit the information entered thus far.

PIN 515 - Enter Project title here - IN PROGRESS

General Information | Project Budget | Funding | Project Management | Legislative Information | Questionnaire | **Attachments** | Status

This tab allows the user to upload attachments in the form of electronic files (i.e., project narratives, maps, spreadsheets). Uploading an attachment is a 4-step process. Click [HERE](#) for instructions on how to upload attachments.
PLEASE NOTE: Click on **ATTACHMENTS** to view a list of attachments associated with the RFP.

Pre-Submission

Pre-Submission Attachments

New Attachment

Attachment Category:

Attachment Title:

File Name:

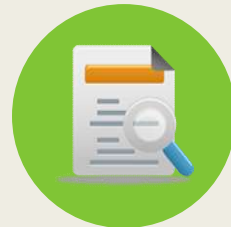
Attachment Title	Phase	Date & Time	Delete?
No Attachments Available to Display			

What's New for 2017

- Applications are submitted through SOAR
- Acquisition project requirements
 - *Acquisition Form*
 - *Willing Landowner Letter*
- Implementation projects must have 65% or greater engineering design at application
- Cost share table will link cost share funds to tasks

Writing Complete Proposals

- Read Solicitation and instructions carefully
 - *Solicitation is new and different from last year*
- Clearly address the criteria outlined in the Solicitation
 - *Make a clear tie between your project and the Solicitation Priorities*
 - *Make a direct connection to existing plans (CWAP, SWAP, other planning documents)*
- Take the time to proof read the proposal
- Request post-award debriefing



Writing Complete Proposals

- Reviewers will evaluate proposals on their content alone
- Tell a story with your proposal
 - *Who? What? Where? Why?*
 - *The submission should be clear and consistent*
 - *The components must be cohesive*

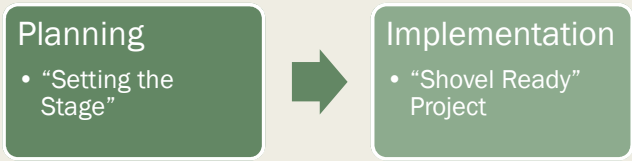
Proposal Consistency Example

- Implementation project
- Project Narrative describes permits that need to be obtained
- These permits should also be included in
 - *Tasks*
 - *Schedule and Deliverables*
 - *Budget*
 - *Environmental Compliance Checklist*



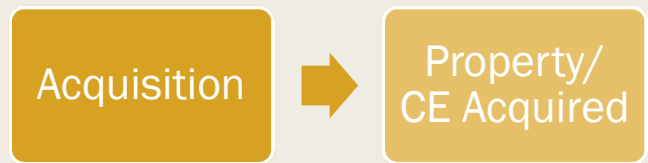
Planning Projects

- Eligible Actions
 - *Baseline Data*
 - *CEQA/NEPA*
 - *Permits*
 - *Engineering Designs*
 - *Site selection*
 - *Feasibility Study*
 - *Monitoring Plan*
 - *Obtain land tenure*



Acquisition Projects

- Eligible Activities
 - *Purchase land or water rights*
 - *Conservation Easement (CE)*
 - *Properties acquired will be site of future restoration actions*



Implementation Projects

- Required at Application
 - *“Shovel ready” project*
 - *CEQA/NEPA near completion/complete*
 - *Permits in progress/in hand*
 - *65% - Final Engineering Designs already complete*
 - *Land tenure established*
- Eligible Activities
 - *Final Permits*
 - *Final Engineering Designs*
 - *Pre- & Post Monitoring*
 - *Construction*
 - *Restoration / Enhancement*
 - *Communicate results*

Scientific Studies Projects

- **Delta Projects only**
- Eligible Activities
 - *Scientific research*
 - *Address priority science needs*
 - *Communicate Results*
 - *Data and findings inform resource policy & management decisions*



Conservation Corps

- Consultation with BOTH the State and Local CCC is required prior to submitting Application
- Projects that solely involve Planning, Acquisition, or Scientific Studies with no field work are exempt but all must still consult
- Consult early in the project development process
- Circle back for budget info / build into project
- Must submit new consultation form: cannot use last year's

State: Prop1@ccc.ca.gov

Local: inquiry@prop1communitycorps.org



Proposal Deadline

SOAR Application and all attachments are
due by 4:00 PM on July 14, 2017
- No Exceptions -



Schedule

- Solicitation Released – May 26, 2017
- Proposals Due July 14, 2017
- Proposals Evaluated July – October 2017
- Director Approval and Award – November 2017
- Grant Agreements Executed – Starting May of 2018



Additional Information

- June 6, 2017 Application Workshop Recording on YouTube
 - *Monitoring Plan and Tools Overview at 28:58*
 - <https://youtu.be/yxIF-88mgOE?t=28m58s>
- Frequently Asked Questions (FAQs)
 - *News and Events Webpage*
 - <https://www.wildlife.ca.gov/Conservation/Watersheds/Restoration-Grants/News>



Questions?

- Email

- **CDFW:** WatershedGrants@wildlife.ca.gov
- **CCC:** Prop1@ccc.ca.gov
- **SOAR:** SOAR_ADMIN@resources.ca.gov

- Website

- **CDFW Prop 1 Information:**
www.wildlife.ca.gov/Conservation/Watersheds/Restoration-Grants
- **SOAR:** www.soar.resources.ca.gov

