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**Application Instructions for the**
**Oklahoma Procurement Technical Assistance Program**

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These instructions apply to operating year August 1, 2021 to July 31, 2022

Your application must be submitted by email to okptac@careertech.ok.gov. Please call 405-743-5571 once you have submitted to confirm we received your email. You may request the application package by emailing that address or by emailing Carter, Shelley or Andria at:

| | |
|---|---|
| Carter Merkle | carter.merkle@careertech.ok.gov |
| Shelley Dawson | shelley.dawson@careertech.ok.gov |
| Andria Henderson | andria.henderson@careertech.ok.gov |

## Section A. Application Components

1.  **Letter of application.** Lead your application with a letter signed by your superintendent or designated person confirming the technology center's intent to have a bid assistance program through the Oklahoma Procurement Technical Assistance Center in the year beginning August 1, 2021. This is not the letter we send later during our application process asking the school to commit to funds necessary to match our federal funding.

2.  **Budget summary and breakdown.** Use the template we provide to send a budget summary in the categories we show. Follow that summary with a detailed budget breakdown by line item. See the example of our statewide proposed budget we provide to use as a guide on the detail needed. Your budget should reflect everything your tech center plans to spend on your program.

3.  **Narrative describing your program.** *Use your narrative from last year and edit it to reflect changes for this year. For example, describe how your method of servicing clients will change to include more virtual meetings and fewer in person meetings and how that impacts your budget. Also explain any new costs you're your own paid account to a video conferencing platform or new supplies that include mobile wifi or a new computer with better camera and microphone. If you believe you need to pay for paid advertising in a local paper or chamber newsletter, please describe and defend that.  Pay special attention to describing how you will provide outreach, counseling services and maintain your expertise through professional development. Also acknowledge the scope of services allowed under the General T&Cs.

    New this past year are specific requirements for training. We will be working with you to help you track your training hours and remain compliant with the requirements. Please explain the best you can how you intend to meet the required training.

    Regarding program income, if you intend to charge registration for any events (for example, to pay for refreshments), please explain how this will benefit your PTAC and enhance the quality of the event. All charges will need to be reported to the ODCTE office on a form that will be provided. Any such program income will need to be tracked by your finance department and remain available only for PTAC expenses.

Any revenue you receive in exchange for something of value (registration fee, fee for use of equipment, etc) is program income and must be reported to the OkPTAC on our Program Income form.

4. **Job descriptions and personnel resume.** Include a job description for any personnel working regularly on PTAC business, whether counselor or support staff. Provide a resume for your PTAC counselor(s).

5. **Organization Chart.** Provide an organization chart showing the chain of command from the PTAC counselor(s) to the superintendent. Include names and email addresses on the chart or in addition to the chart.

6. **Proposed Primary Area of Coverage**. Use the sheet provided to describe your Proposed Primary Area of Coverage. This is the area in which you will promote your program, recruit new clients and for the most part counsel clients. You may be asked to counsel clients from anywhere in the state, but this area will be your primary focus. If you use your school's district, please include a map or provide a URL to a map so we can study coverage. You can also declare whole counties if that works better for you. If what you proposed last year satisfies this requirement, simply state no change or copy and paste your content from last year.

7. **Performance Goals**. Use the chart we provide to state your goals for new clients, hours of counseling and number of participated events. Add a simple statement saying how you arrived at these goals. Refer to the instructions for the DLA Form 1806 in Appendix A to the PTAP General Terms and Conditions for more information about your goals.

**Note**: this is an option year for all existing OkPTAC offices. If any of the documents above have not changed from last year then just refer to last year's submission. The exceptions are your budget and performance goals, which must be submitted each year. Your narrative can be short if most of your budget is very similar to last year. Just focus on what might need new explanation.

## Section B. Program Budget and Selected Items of Cost

In your budget breakdown show the separate items of cost included in your proposal so that we can make a determination concerning the reasonableness of your overall budget. Provide detailed descriptions of costs to show how amounts were arrived at and the basis of your estimates. Ensure that there is no ambiguity as to whether a particular cost is necessary for the efficient operation of a PTAC. Guidance is provided below on describing costs and including them in the appropriate cost category. Similar to how you describe costs, if your proposal includes third-party in-kind contributions, they should be described and their values included in the appropriate cost category.

1. Personnel

List all of your personnel positions included in the budget.

Describe each position's percent of time working on the program in terms of the time employed by you. For example, show a staff member who dedicates all of his or her time to the PTAC while employed as a 100% contributor, regardless of whether that person is a full or part-time employee. Less than 100% contributors are those personnel that share time between the PTAC and other programs in the course of their employment with you. Describe the position, location, and include the name of employee occupying positions that are filled.

2. Fringe Benefits

Show fringe benefit costs for each position you included in the budget.

3. Travel

Separate and describe the purpose of each travel item. Provide an estimate that includes, as applicable, the number of travelers, names of travelers, number of days lodging, airfare, meal allowance, rental car, conference registration fees, mileage and mileage rate, etc. Provide the basis for your estimates.

a. Local travel. Provide the purpose, mileage and mileage rate for any local travel. A summary entry may be made for recurring routine trips. Describe the basis for estimated amounts such as an estimated number of miles per year.

b. Training. Identify the course to include name, source and duration. Consider the free online training through the Defense Acquisition University (DAU), especially in the areas of Contracting (CON), Small Business Programs (SBP), and Acquisition (ACQ).

c. Registration fees. Registration fees related to travel should be listed with the related travel expense. Include conference, seminar, workshop and event fees.

4. Equipment

*Equipment* means tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by you for financial statement purposes, or $5,000. Individual items costing less (e.g., most computers and printers) are supplies rather than equipment.

Describe the purpose of any equipment and the basis for your estimated amounts. Where equipment is being replaced, provide the age of the equipment needing replacement and justify the need for its replacement. Note there is a Federal interest in any equipment that you acquire or improve under an award. Refer to the Part 5, "Property Administration," in the PTAP General Terms and Conditions.

5. Supplies

General office supplies may be summarized on a monthly basis, showing the monthly amount x 12 and the estimated total. Individual supply items in excess of $1,000 per month or $12,000 per year should usually be shown separately. Items such as computers

costing less than $5,000 each should normally be shown as supplies.

6. Contractual

Itemize consultant and contractor costs (may not exceed 10% of total program cost). Include a description of the purchase and an explanation as to why it is necessary. Explain how costs were derived and include the basis for estimates (e.g., number of hours and the cost per hour). We will purchase statewide for ptAssist, GovSpend, PartsBase, Govology, NCMA memberships and APTAC membership.

7. Other

Items may include, but are not limited to, computer software, copying, postage, printing, publications, subscriptions and telephone. Itemize disparate items separately and describe the basis for their cost. This category may not apply in your case.

a. Rental expenses. Show costs for rental of office space and other facilities. Include the address of the property and describe how it is priced such as an annual cost per square foot or a monthly or daily rental rate. Probably not applicable to you.

b. Facilities and utilities. These costs are generally considered overhead of our technology centers and don't need to appear on your budget.

c. Publications and subscriptions. Itemize costs for each individual publication or subscription.

d. Membership. The state program will provide APTAC and NCMA memberships. Local chambers memberships are assumed overhead. All membership costs must be organizational rather than personal (member is the tech center, not the individual).