

US EPA ARCHIVE DOCUMENT

## **Convening Assistance for XL Projects**

### **- How to Tap Into the Office of Reinvention's Convening Work Assignment -**

To get neutral convening help for an XL project, go through the following steps:

1. Ask Nina Bonnelycke (202-260-3344) for a copy of the work assignment and budget estimate. Determine based on the work assignment whether what you want to do is covered under the scope of work. If you have any questions, doublecheck with Nina. In general, the work assignment covers four areas:
  - Convening support for stakeholder groups
  - Facilitation support for stakeholder groups
  - Convening support for EPA teams
  - Facilitation support for EPA teams.
2. Check with Chris Knopes (202-260-9298) to make sure he's OK with using the work assignment to assist the project. We have limited funds, so we need to make sure we're targeting available resources appropriately.
3. Call the contractor, Linda Manning at Marasco Newton Group (703-247-4731), to go over your plans with her. (This step is not required, but it helps Marasco prepare for your work.)
4. Put together an estimate of the hours/direct costs that you anticipate Marasco will incur.

The cost for each type of assistance is estimated as follows:

- . Stakeholder convening - \$10,000 per project
- . Stakeholder issue facilitation - \$6,500 per project
- . EPA team convening - \$7,000 per project
- . EPA team issue facilitation - \$4,000 per project

To build up the budget, you should use an hourly labor rate for a senior convenor of about \$150. To estimate the direct costs, you should include contractor travel (use a local contractor when possible), communications (include phone and overnight mail), xeroxing, and meeting facilities. Refer to the budget estimate you requested from Nina in Step 1 if you get stuck.

5. Complete the Technical Directive as suggested in the attached boilerplate (*see attached form*). Get a number for the TD from Nina. Don't forget the attachments.
6. Get Nina to have the DOPO (Kim Greene-Goldsborough) sign off; send out copies as indicated on the Technical Directive boilerplate.

7. Meet with the contractor as discussed in the work assignment.
8. Once you know who your subcontractor is, work with that person to set up the facilitation. Follow the general instructions provided in the work assignment's scope of work. You need to go over what you will cover at the various meetings--it would be nice if we could assume they know what we want to cover at the meetings, but we can't!
9. Keep Chris Knopes posted on how the work and budget are playing out.

## Technical Directive Form

Date: \_\_\_\_\_

Re: Technical Directive # \_\_\_\_\_ (*get this number from Nina*) to Authorize Work under Delivery Order # 0020, "Convening and Facilitation Support for XL Projects" under Contract # 68-99-010, "Consensus and Dispute Resolution Services Contract"

To: Linda Manning (ph: 703-247-4731; fax: 703-516-9108)  
Marasco Newton Group  
2801 Clarendon Blvd.  
Arlington, VA 22201

From: Kim Greene-Goldsborough, EPA Delivery Order Project Officer  
\_\_\_\_\_ (Signature)

cc: Rodney Magee, EPA Contracting Officer (Fax: 202-565-2554)  
Debbie Dalton, EPA Project Officer (Fax: 202-260-5478)

In accordance with Delivery Order #0020 of Contract 68-99-010, Marasco Newton Group is hereby authorized to initiate support for the XL project \_\_\_\_\_ (*put project title here*).

In this XL project, \_\_\_\_\_ (*insert name of project sponsor*) proposes to (*put a brief paragraph summarizing the XL project here*). A copy of the proposal is attached to this Technical Directive, along with (*summarize any other attachments here*). The EPA lead for this project is \_\_\_\_\_ (*put EPA project lead name here*); contact information for the project lead is provided below.

Under this technical directive, Marasco Newton Group is authorized to provide support as follows:

(*Check off as appropriate...*)

- Convening support for stakeholder groups
- Facilitation support for stakeholder groups
- Convening support for EPA teams
- Facilitation support for EPA teams

Specifically, the work Marasco Newton Group is to perform under this T.D. will entail (*put some brief details of the work you want Marasco to do*).

(*If you had work done for your XL project under the old RESOLVE work assignment and*

want to continue work with the same facilitator, add this paragraph:) Work to support this XL project was initiated under Work Assignment No. 182, Contract No. 68-W4-0001. Subcontractors assisting in this effort were \_\_\_\_\_ (name the sub you used and provide contact info).

Marasco Newton Group is authorized to spend up to \_\_\_\_ hours (including travel) on this effort and to be reimbursed for direct expenses. The contractor shall submit a budget for the work under this Technical Directive and shall track the budget for the effort by sub-cost element.

Project Sponsor Contact: \_\_\_\_\_

Project Sponsor Phone No.: \_\_\_\_\_

Project Sponsor Fax No.: \_\_\_\_\_

Project Sponsor Email: \_\_\_\_\_

(Note: Contractor shall not contact sponsor prior to discussions with EPA project lead.)

Project Sponsor Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

EPA Project Lead: \_\_\_\_\_

Telephone No.: \_\_\_\_\_ Fax No.: \_\_\_\_\_

Email: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

- Attachments: Project Proposal  
Preliminary List of Stakeholders  
Other (put here anything else you think would help the contractor get going on the work)