

Energy and Mineral Development Program

Amanda John
Architectural Engineer

Who We Are

Assistant Secretary – Indian Affairs

Director Bureau of Indian Affairs

Deputy Director
Field Operations

Deputy Director
Tribal Services

Deputy Director
Law Enforcement Services

Deputy Director
Trust Services

Director Bureau of Indian Education

Division of Compliance
Monitoring and
Accountability

Deputy Director Policy,
Evaluation Post
Secondary Education

Deputy Director
School Operations

Director Office of Indian Energy and Economic Development

Division of Energy and
Mineral Development

Division of Economic
Development

Division of Workforce
Development

Division of Capital
Investment

Division of Energy
Policy Development

EMDP

- ◆ Annual funding program
- ◆ Federal Register
 - ◆ TBA 2012
 - ◆ Allow an average 60-90+ days response
 - ◆ After responses are due, DEMD has 30 days to issue a response to Tribes



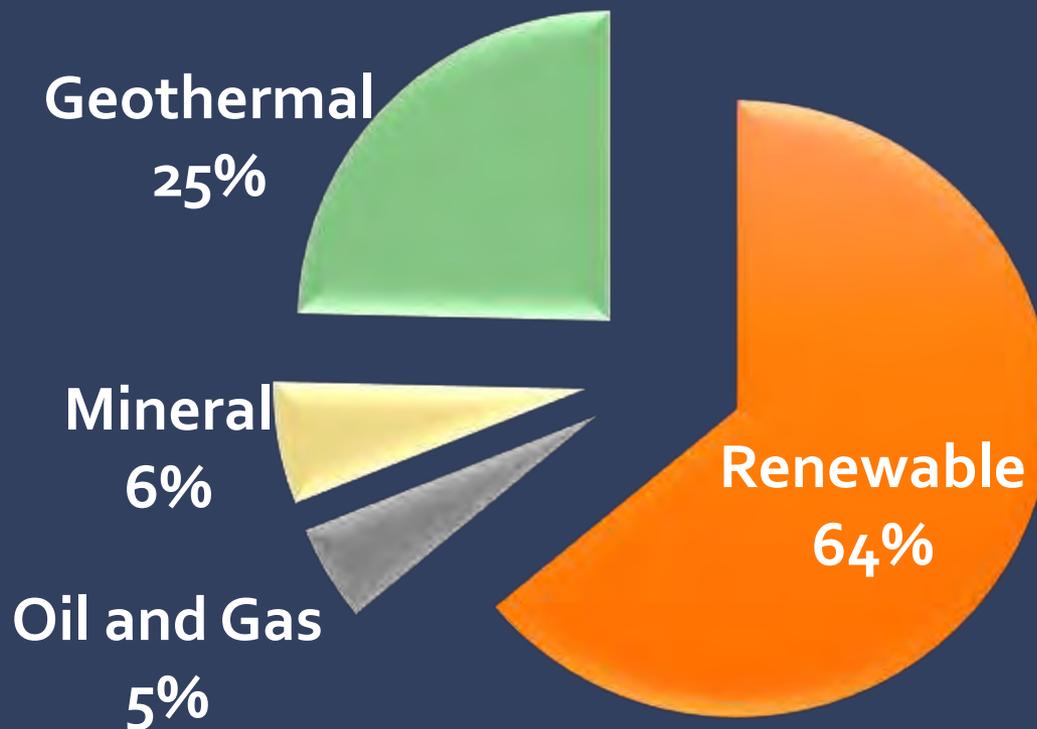
What Type of projects qualify?

- ◆ Energy and Mineral Development Projects
 - ◆ Renewable: Biomass (Woody, Waste-to-Energy), Wind, Hydroelectric, Geothermal, and Solar.
 - ◆ Conventional (Oil, Gas, and Coal)
 - ◆ Mineral
- ◆ Pre-Development work:
 - ◆ Resource Assessment/Exploration studies
 - ◆ Feasibility studies
 - ◆ Market studies
 - ◆ Engineering studies

In previous years a portion of the program has been earmarked for renewable energy projects and construction materials.

What did the EMDP Fund in the past years?

Percentage of Total \$ Awarded by Resource
Jan 2010 – May 2011
(\$11,018,370)



46 Total Projects

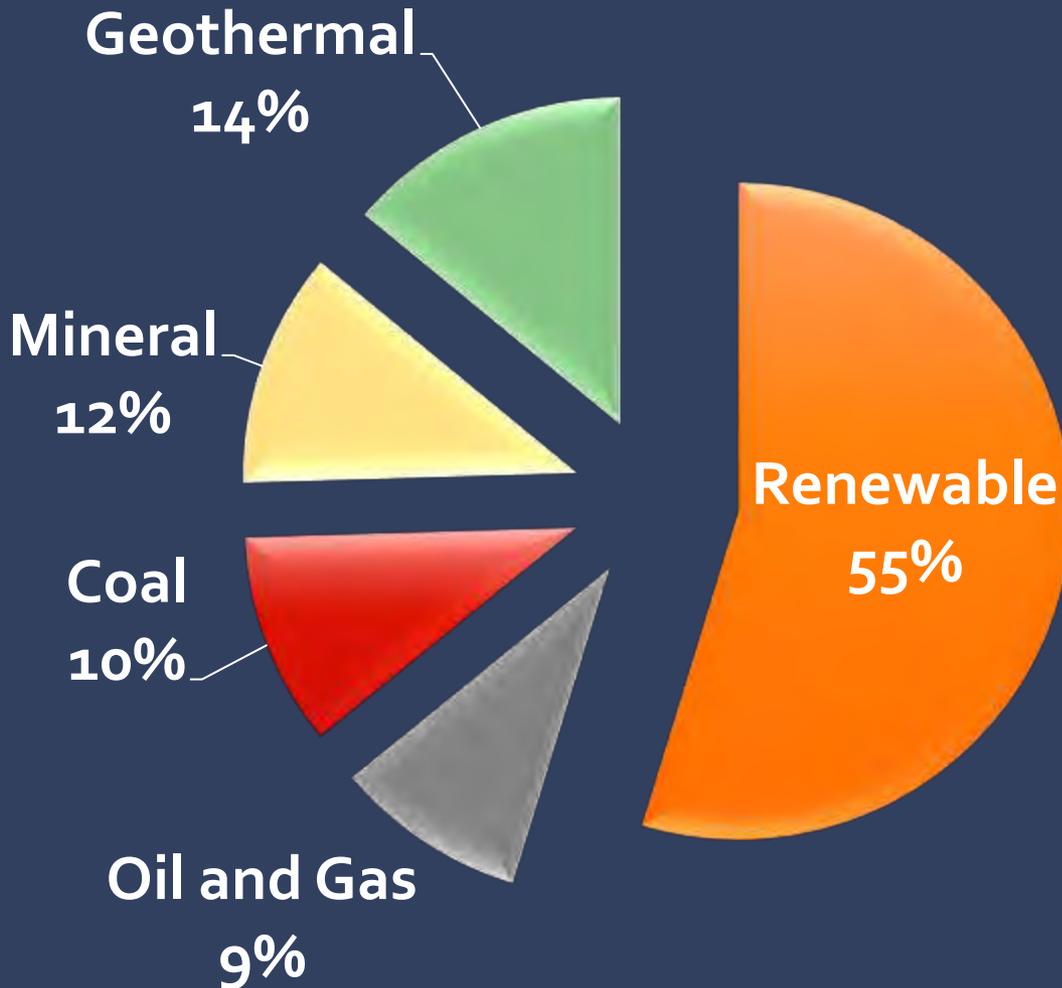
37 - Renewable

3 - Oil and Gas

5 - Mineral

What did the EMDP Fund in the past years?

Percentage of Total \$ Awarded
2011 EMDP
(\$4,173,500)



28 Total Projects
15 - Renewable
2 - Geothermal
5 - Oil and Gas
3 - Mineral
3 - Coal

Compliance Factors

- ◆ Project must be on land held in trust or restricted fee by the Federal Government
- ◆ Multi-year projects
 - ◆ Cannot award multi-year funding
 - ◆ Tribes to submit each year for next stage of project - funds are not guaranteed for multi-year projects
- ◆ Proposed project tasks should be accomplishable in one year

Un-fundable Tasks Highlights

- ◆ Establish or fund operation of a tribal office
- ◆ Full tribal salaries for the year
- ◆ Indirect costs or overhead
- ◆ Cannot purchase the equipment for the assessment of energy and mineral resources (e.g. anemometer towers)
- ◆ Cannot purchase or lease the equipment for the development of energy and mineral resources
- ◆ Legal fees
- ◆ Application fees associated with permitting

Best Practices

- ◆ Contact DEMD staff to discuss project
 - ◆ Submit draft for general review and response
- ◆ Discuss pertinent details concerning the project
- ◆ Elaborate on how the project fits with the Tribe's goals
 - ◆ Economic Development
 - ◆ Jobs & Income



Best Practices

- ◆ Line Item Budget
 - ◆ Consultant / Tribal Personnel
 - ◆ Specific Studies
 - ◆ Separate excel file
- ◆ Be specific in project tasks and what the end product is for each task - Deliverables

Absolute Requirements

- ◆ Tribal Resolution
 - ◆ Signed
 - ◆ Specifically addresses the proposed project
 - ◆ A statement that the tribe is willing to consider development of any potential energy or mineral resource discovered
 - ◆ A statement that the tribe will consider public release of information obtained from the energy and mineral development study.
 - ◆ Possible to enter into a 638 contract with BIA region/agency
- ◆ Scope of Work & Detailed Budget
- ◆ Tribal Project Lead Contact Information

Application Submission

- ◆ 20 Page Limit - describe project (scope, budget, reason why study is needed, benefits, charts, maps, graphs, etc.)
 - ◆ Appendix unlimited pages (history, location, government structure, technology description, etc.)
- ◆ DEMD Assistance – resource, technology info
 - ◆ Written Request
- ◆ Email Application Submission

Website will have:

- Copy of the current solicitation
- Frequently asked questions
- Sample proposals, etc

Previous Scoring Criteria

- ◆ **10 pts** - Resource Potential
- ◆ **15 pts** - Marketability of the Resource
- ◆ **25 pts** - Economic Benefits Produced by the Project
- ◆ **20 pts** - Tribe's willingness to Develop and Commitment to the Project
- ◆ **15 pts** - Budget Completeness, Cost Reasonableness, Cost Realism and Detail
- ◆ **15 pts** - Adequacy of the Technical Proposal and Statement of Work



"When Will I hear if The Project has been Funded?"

- ◆ Allow 30 -60 days after proposal due date
 - ◆ Formal letter will be written to the Tribal Chairperson/President
- ◆ In the event a project is funded
 - ◆ Self-governance tribes
 - ◆ Tribe will receive funds from the self-governance office
 - ◆ Rare cases of a 638 contract with agency/region
 - ◆ Non-Self-governance tribes
 - ◆ Tribe will receive funds from their respective BIA agency/region - 638 contract

Awarded Projects: Self Governance Tribes

- ◆ Office of Self Governance (Washington, D.C.)
 - ◆ Funds are normally process through amendments to Tribes original agreements with the OSG office
 - ◆ Amendments have to written and signed off by the Tribal Chairman and OSG in order to be processed (2+ months)
- ◆ Discuss proposed changes to scope, budget, and time with DEMD office.
 - ◆ Tribes please check with your financial office to ensure this process to make sure there is not other “middleman” as a precaution
- ◆ Special cases, some tribes may enter a 638 contract with their BIA Agency/Region.

Awarded Projects: Non-Self Governance Tribe

- ◆ 638 Contract will be between the Tribe and respective BIA Agency/Region.
 - ◆ allow 4 weeks + from time award letter is signed
 - ◆ Awarding Official (AO) will create contact
 - ◆ Awarding Official Technical Representative (AOTR), etc. may be appointed by AO. In some cases a project monitor may be appointed at this or a similar designation.

638 Contracts overview

- ◆ Awarding official requires the following at minimum
 - ◆ Final Statement of Work and Budget Estimate
 - ◆ Tribal Resolution
 - ◆ EMDP Reporting Requirements for tribes to follow (Section I)
- ◆ Project Monitor cannot approve proposed changes – ONLY RECOMMEND approval to the AO/AOTR, etc.
 - ◆ Changes may extend to scope and budget modification, contract extension, etc.
 - ◆ When in doubt ask questions to AO!
 - ◆ May direct questions to Amanda John or Robert Anderson.
- ◆ DEMD will submit recommendations to the Agency/Region
 - ◆ cc Agency/Region and Tribe if needed
- ◆ DEMD office will be requesting contracts from the Tribe or Agency/Region for office records.

Reporting / Compliance

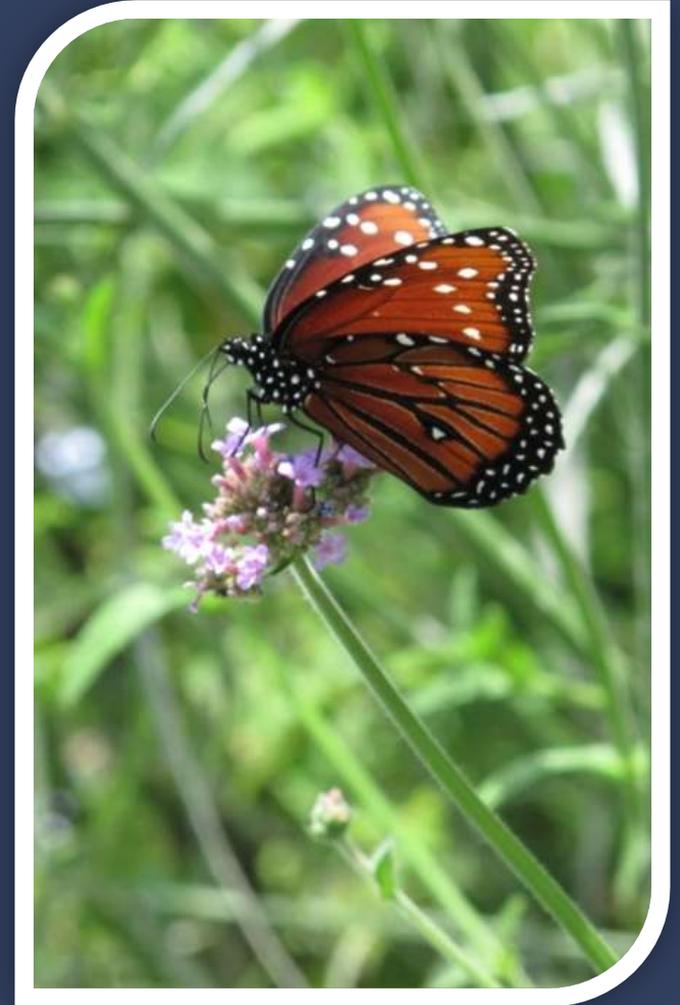
- ◆ Project Term
 - ◆ Check 638 contract (1-2-3+ years)
- ◆ **Quarter reports** – due dates may be determined b/w Tribe and Project Monitor or BIA
 - ◆ 1-2 pg summary of events, accomplishment, problems, budget review/summary, etc.
 - ◆ Financial reports - may be requested by project monitor
 - ◆ Project Monitor may request a copy of those received by the Region or Agency as an alternative.
- ◆ **Final report**
 - ◆ Due at the end of project

Questions?

INFORMATION ON DEMD WEB SITE:

Additional information about the EMDP program may be gathered from the DEMD web site, such as:

- Sample EMDP proposals
- EMDP FAQ and Contact Info



- ◆ Have questions about the EMDP program or submission process?
 - ◆ Amanda John *Amanda John*, Tel: (720) 407-0672; email amanda.john@bia.gov or
 - ◆ Robert Anderson, Tel: (720) 407-0602; e-mail: robert.anderson@bia.gov
- ◆ For Additional Copies of the Proposal Writing Guidelines Manual:
 - ◆ Tahnee KillsCrow, Tel: (720) 407-0655; e-mail: tahnee.killscrow@bia.gov;

Technical Questions:

- ◆ Mineral Projects (Precious Metals, Sand and Gravel):
 - ◆ Lynne Carpenter, Tel: (720) 407-0605, e-mail: lynne.carpenter@bia.gov, or
 - ◆ David Holmes, Tel: (720) 407-0609, e-mail: david.holmes@bia.gov
- ◆ Conventional Energy Projects (Oil, Natural Gas, Coal):
 - ◆ Bob Just, Tel: (720) 407-0611, e-mail: robert.just@bia.gov
- ◆ Renewable Energy Projects (Biomass, Wind, Solar):
 - ◆ Winter Jojola-Talburt, Tel: (720) 407-0668, e-mail: winter.jojola-talburt@bia.gov
- ◆ Geothermal Energy:
 - ◆ Bob Just, Tel: (720) 407-0611, e-mail: robert.just@bia.gov

Amanda John

Architectural Engineer – Renewable Energy

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Tel: 303-969-5270 ext 382



Native American Business Development Institute (NABDI)

*Office of Indian
Energy and Economic Development*

DIVISION OF ECONOMIC DEVELOPMENT

Who We Are

Assistant Secretary – Indian Affairs

Director
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Deputy Director
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Native American Business Development Institute (NABDI)

- **Non-recurring appropriation**
- **Federal Register**
- **Closed 8/12/2011**

What kind of projects qualify?

⦿ Economic Development Projects

- Hire consultants
 - Feasibility studies
 - Long term, strategic reservation wide economic development plans
- Job creation
- Revenue to Tribe
- Tribal commitment - \$\$\$, personnel
- Duplication of project for other Tribes

NABDI Best Practices

- Contact DED staff to discuss project
- Send in draft for general review
- Allow plenty of response time
- Pertinent details on project
- How does this fit in to the Tribe's goals?

- Trust Lands
- Compliance history
- BIA Sanctions list
- Status of previous NABDI projects
- Multiple projects
- Multi-year projects

- Use of existing data
- IEED technical services
- Tribal choice of consultant
- What cannot be funded
 - Tribal office, purchase of office equipment
 - Limited Tribal salaries
 - Indirect costs and overhead
 - Purchase of equipment to be used in feasibility studies.

◎ What cannot be funded

- Legal fees
- Application fees associated with permitting
- Research and development of unproved technologies
- Training
- Contract negotiation fees
- Purchase of data that is available through IEED
- Any other activities not authorized by the tribal resolution or by the award letter.

NABDI Mandatory Components

- Tribal Resolution
- Statement of Work
- Budget & Consultants

Mandatory Components

◎ Tribal Resolution

- Current
- Description of the feasibility studies or economic development plan
- Statement of willingness to implement the economic
- Statement describing how the tribe plans to retain consultants
- Statement that the tribe will consider public release of information obtained
- Include Self Determination agreement statement

Mandatory Components

◎ Statement of Work

- Overview and Technical Summary of the Work
- Technical Summary of Project
- Project Objective, Goals and Scope of Work
- Deliverable Products
- Resumes of Key Personnel

Mandatory Components

◎ Budget & Consultants

- Description of Consultants
 - Technical expertise
 - Qualifications
 - Suitability
- Contracted Personnel Costs
- Travel Estimates
- Data Collection and Analysis Costs
- Other Expenses

2011 NABDI Scoring Criteria

- ◎ **10 pts** – Economic Opportunity Potential
- ◎ **20 pts** - Marketability of the Opportunity
- ◎ **35 pts** - Economic Benefits Produced by the Project
- ◎ **10 pts** - Tribe's willingness to Implement the Project
- ◎ **25 pts** – Tribal Commitment to the Project

Program Contact

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Washington, DC 20245**

Victor.Christiansen@bia.gov

(202) 219-0739

www.indianaffairs.gov/ieed

