# APPLICANT HANDBOOK

## Community Grants 2026

**March 2026**

PORTLAND CLEAN ENERGY COMMUNITY BENEFITS FUND

## LANGUAGE ACCESS

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## VERSION LOG

This log tracks updates made to the Applicant Handbook after its initial release. If corrections or clarifications are issued, they will be documented below. Applicants are responsible for reviewing the most current version of the handbook when preparing and submitting their application.

| Version | Date Issued | Summary of Changes |
|---|---|---|
| 1.0 (Initial Release) | 03/25/2026 | Original version published. |

To ensure you are referencing the most recent version, please check the PCEF Technical Assistance webpage.

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## WELCOME LETTER

March 2026

Dear Applicant,

Welcome to the Portland Clean Energy Community Benefits Fund (PCEF) Community Grants 2026 funding opportunity! This cycle, we are awarding up to $60 million to community-based nonprofit organizations for projects that address climate change, benefit those most impacted by it, and advance social, economic, and climate justice.

Before you get started, we want to express our deepest gratitude.

Your work bringing forward community-rooted solutions, organizing for change, and envisioning a healthier, more just future is the lifeblood of PCEF. Together, we are building a city where clean energy, low-carbon transportation, good jobs, green spaces, and thriving communities are the standard, not the exception. The need for this work is immense, and we look forward to supporting many impactful community projects. Whether or not your project is funded this year, your efforts are critical to shaping our collective future.

Community Grants remain the cornerstone of PCEF's work. Designed to support community-based nonprofit organizations in proposing projects that matter most to their communities, this program reflects our commitment to partnership: you bring the vision, leadership, and community connection, and we bring the resources to help move that work forward.

This handbook is your guide to the application process. We hope it provides the clarity, information, and tools you need to bring your vision to life.

Thank you for your dedication to planning and proposing your project, and for your part in building a climate-resilient future for our city.

Sincerely,
Sam Baraso
*PCEF Program Manager*

# SECTION 1: APPLICATION PROCESS AND RESOURCES OVERVIEW

## WHAT IS PCEF?

The Portland Clean Energy Community Benefits Fund, or PCEF, was created in 2018 by a ballot initiative passed by 65% of Portland voters. PCEF is funded through a 1% surcharge on the Portland sales of large retailers with $1 billion in national revenue and $500,000 in local revenue.

PCEF provides a consistent, long-term funding source and oversight structure for community climate work that supports social, economic and environmental benefits for all Portlanders, particularly communities of color and people with low incomes.

PCEF's spending of roughly $1.6 billion for 2023-2029 is directed by our five-yearhttps://www.portland.gov/bps/cleanenergy/climate-investment-project/documents/pcef-climate-investment-plan-amended-dec-2024/download Climate Investment Plan (CIP). These investments include annual Community Grants cycles and Strategic Programs implemented by partners at the City and in community, help ensure our most impacted residents are prepared for a changing climate as we support the City's goal of net-zero carbon emissions by 2050.

**Check out our progress on the PCEF Dashboard!**

## HOW TO USE THIS HANDBOOK

This handbook is your comprehensive guide to applying for a PCEF Community Grant. It is designed to help you determine if your organization and project are eligible, understand the requirements and funding categories, and complete a strong and complete application.

- Start with **Section 1** for an overview of the grant process, important dates, and resources available to support you—including technical assistance and links to tools like application templates and budget planning spreadsheets.
- Use **Section 2** to explore the types of grants available, funding limits, PCEF minimum wage requirements, and detailed guidance for each funding category. This section also outlines how PCEF funds can and cannot be used and highlights key requirements like wage standards and invoicing expectations.
- **Section 3** provides detailed guidance for completing your application. You'll also find detailed explanations for how to fill out each budget line item, along with tips to help ensure accuracy and compliance.

- Finally, **Section 4** includes important reference materials, including insurance guidance, a glossary of terms, sample energy efficiency budget, and the scoring criteria used to evaluate applications.

We encourage you to read the handbook carefully and refer to it throughout your application process. It is a valuable tool to help you stay organized, meet program expectations, and submit a strong proposal aligned with PCEF's goals of climate action and justice.

## OVERVIEW OF HOW TO APPLY

To apply for a PCEF 2026 Community Grant, follow these steps:

1. **Review this Applicant Handbook** - Start by reading this handbook thoroughly to understand eligibility, funding areas, allowable expenses, and application requirements.
2. **Set Up Your WebGrants Account** - Visit the WebGrants portal to create an account or log in to an existing one. It may take 1–2 business days to approve new registrations, so register early. Access WebGrants here.
3. **Explore Technical Assistance Resources** - Visit the Technical Assistance for 2026 Community Grants webpage to access videos, webinars, and guidance documents that can help you strengthen your application. Technical Assistance webpage
4. **Determine Your Grant Type and Funding Area(s)** - Decide whether to apply for a planning or implementation grant. Identify which funding area(s) align with your project and determine your primary funding area. Funding Details and Requirements
5. **Review Allowable Expenses and Restrictions** - Confirm that your budget aligns with eligible expenses, that you accounted for PCEF wage requirements, and that you understand any restrictions on the use of funds. Funding Category Details
6. **(Optional) Use Application Templates** - Download application templates to draft your responses and collaborate with your team. Templates are for planning purposes only—all final submissions must be made through WebGrants. Technical Assistance webpage
7. **Prepare Your Application Materials** - Gather all required documents and finalize your responses before entering them into WebGrants. Confirm that your proposed budget reflects PCEF wage requirements.
8. **Submit Your Application in WebGrants** - Enter your application in WebGrants and submit it before the deadline. You can save your progress and return to it at any time before submission. Access WebGrants here.

## RESOURCES AND TECHNICAL ASSISTANCE

A variety of resources are available to help you prepare a strong Community Grant application. Visit the Technical Assistance webpage to access the following:

- **Informational Videos** - Watch recorded presentations that walk through the application process and provide important program context.
- **Application Templates** - Download templates to draft your application responses and collaborate with your team before submitting in WebGrants.
- **Grant Writing Video** – Watch recorded presentation providing guidance on best practices in grant writing and budget development.
- **Recorded Webinars by Topic** - Explore technical assistance webinars focused on specific funding areas, such as energy efficiency and renewable energy, workforce development, transportation decarbonization, and regenerative agriculture and green infrastructure. These sessions offer best practices and guidance from PCEF staff and community partners.
- **Office Hours with PCEF Staff** - Attend office hours to ask questions and get real-time support from PCEF staff during the open application period.
- **One-on-One Technical Assistance for Energy Efficiency and Renewable Energy Applicants** – Request individual support from contracted service providers on energy efficiency and renewable energy project scoping. Space is limited and selection is based on specific prioritization.
- **Energy Efficiency and Renewable Energy Guidance Documents** - Access detailed guidance for energy-related projects, including eligible measures, retrofit guidelines, renewables participation requirements, and installation checklists.
- **WebGrants Support** - Review step-by-step guidance for using the WebGrants platform, including account setup, navigation tips, and submission reminders.
- **Glossary of Terms** - Use the glossary to better understand terminology used throughout the handbook and application process. The glossary is also included in this handbook in Appendix C: Glossary of Terms.
- **View Past Applications** – Gain insight and inspiration from the online database of prior Community Grant applications, including project descriptions and funding outcomes.

## ANTICIPATED FUNDING TIMELINE

The anticipated timeline for the 2026 Community Grants funding cycle is as follows. Please note that this timeline is subject to change.

- March 25 – May 27, 2026: Application period
- Summer 2026: Grant application review, evaluation, and selection
- Fall 2026: Recommendations submitted to City Administrator for approval
- Fall 2026: Intent to award notifications shared with selected applicants
- Winter 2026: Grantee onboarding kick-off

Once grant agreements are executed, grantees may begin invoicing for funds. PCEF processes payments on a quarterly basis. For each quarter, you may choose to:

- Submit a reimbursement request for expenses incurred, and/or
- Request an advance for projected expenses (please see PCEF Advance policy for more information), and reconcile at the end of the quarter

## ELIGIBILITY - WHO CAN APPLY FOR A PCEF COMMUNITY GRANT?

Qualified nonprofit organizations who meet all the following requirements are eligible to apply for PCEF grant funds:

1. Designated by the Federal government as a 501(c) or 521(a) nonprofit entity.
2. Registered and certified with the Oregon Secretary of State as a nonprofit organization.
3. NOT on the Oregon Department of Justice list of Disqualified Charities.

Qualified nonprofit organizations do not need to be located within the City of Portland but all projects with physical improvements must be located within the City of Portland. Workforce and contractor development projects must serve residents located within the Portland Metropolitan Statistical Area.

Newly established or emerging groups who do not meet the 501(c) or 521(a) designation requirement, or eligible nonprofits seeking additional administrative capacity, may apply for a PCEF grant with a fiscal sponsor. A fiscal sponsor is an eligible nonprofit organization that provides necessary infrastructure and administrative support for managing a grant.

# ELIGIBILITY LIMITATIONS AND COMPLIANCE REQUIREMENTS

## NUMBER OF ELIGIBLE APPLICATIONS:

- Organizations may submit **up to two grant applications** as the primary applicant.
- If submitting more than one application, the second must either:
    - Fall under a different primary funding category, or
    - Be a different type of grant application (e.g., one planning grant and one implementation grant).
    - *Examples:*
        - *One planning grant and one implementation grant, or*
        - *One clean energy implementation grant and one transportation decarbonization implementation grant.*
        - *One regenerative agriculture implementation grant and one regenerative agriculture general operating support grant*
- Implementation grant applications may include activities spanning multiple funding categories. However, each application must designate a primary funding category, based on where the largest share of the proposed budget will be spent.
- Each application must focus on a single, cohesive project or program with interrelated milestones. Proposals may include components from different funding areas, but all elements must be clearly connected within a unified project.
- Applications that combine multiple unrelated projects or programs into one proposal will be considered an attempt to bypass application limits and will not be eligible.
- **Important note:** If an organization submits more than two applications as the primary applicant, only the first two complete submissions that are different type of grant applications will be considered. Additional submissions will be deemed ineligible.

## COMPLIANCE REQUIREMENTS FOR CURRENT GRANTEES:

Current grantees may submit grant applications for new scopes of work. Current grantees must be in good standing with their active PCEF grant to be eligible to apply in a new funding cycle. Organizations that are significantly underspent or delayed in their current grant implementation or have been notified that they are at risk of grant cancellation at the time of applying for a new grant, may be deemed ineligible until their current grant concerns are resolved.

# SECTION 2: FUNDING DETAILS AND REQUIREMENTS

Use this section to understand the types of grants available, determine which grant type best fits your project, and review the funding limits for each category.

## 2.1 GRANT TYPES AND FUNDING AVAILABILITY

### TYPES OF GRANT APPLICATIONS

This section outlines the two types of grants applications available and key considerations for applicants. Use it to determine which grant type best fits your project and funding needs. Understanding these distinctions will help you submit a strong application that aligns with program goals and requirements.

#### PLANNING GRANTS

Planning grants support organizations in conducting assessments and other preparatory activities needed to develop a full project proposal. These grants are intended for work that lays the foundation for future implementation.

- Planning grants cannot be used for any costs associated with project implementation activities. Receiving a planning grant does not guarantee future funding awards.
- Planning grants should clearly describe the process and outcomes it hopes to achieve. The application should make a clear connection between the planning process and how it will lead to a successful project that aligns with PCEF's goals addressing climate change while advancing social, economic, and climate justice.
- Planning grants can range from one to two years in duration.

There are two funding levels based on the type of planning activity:

- Up to $100,000 for planning activities such as community engagement, general research, or curriculum development.
- Up to $200,000 for proposed projects that include highly technical planning activities such as construction feasibility studies, energy modeling, or fleet assessments. This higher cap reflects the additional cost and expertise often required for in-depth technical planning.
- Note: Final funding amounts will be validated by PCEF staff based on the scope of work.

### IMPLEMENTATION GRANTS

Implementation grants can be used for projects that address climate change and advance social, economic, and climate justice.

- Projects can include physical improvements (e.g., weatherization, solar installations, tree planting, or regenerative agriculture) and/or non-physical activities (e.g., workforce training).
- Grant funds can be used to pay PCEF-compliant wages for staff and worker time, contracted work, purchase of equipment, materials and supplies, costs associated with fulfilling program requirements (e.g., additional insurance, reporting), and other items needed to complete the project.
- Some planning can be a part of an implementation grant application, but implementation must be the primary focus of the application.
- Implementation grants can range from one to five years, unless otherwise stipulated in specific funding category requirements below.

## EXPECTED FUNDING AND GRANT CAPS

### NOTE ON IMPLEMENTATION GRANT SIZES

We use small and large grant caps to help ensure a mix of projects within each portfolio, creating opportunities for smaller organizations with more modest budget needs.

- The application process for large and small grant sizes is identical.
- The distinction between small and large grants allows staff to balance the grant portfolio to achieve a diverse range of project sizes.
- We strongly encourage organizations to assess your capacity to manage grant funds and scale your requests accordingly.
- Organizations should request the amount needed to successfully deliver a project with strong climate and community benefits, without requesting more than your organization can effectively manage.

## GRANT AVAILABILITY BY FUNDING CATEGORY

| Primary Funding Category | Total allocation | Large grant cap | Small grant cap | General operations grants (Only for regenerative agriculture organizations) |
|---|---|---|---|---|
| **Regenerative Agriculture** | Up to $5.3 million | $1 million | $200,000 | Up to 25% of the organization's annual operating budget or $200,000, whichever is lower. |
| **Green Infrastructure** | Up to $1.7 million | $1 million | $200,000 | |
| **Transportation Decarbonization** | Up to $12 million | $4 million | $500,000 | |
| **Workforce and Contractor Development** | Up to $7.9 million | $1.5 million | $500,000 | |
| **Youth Workforce Education and Exposure** | Up to $800,000 | $400,000 | | |
| **Energy Efficiency and Renewable Energy** | Up to $31 million | $5 million | $2 million | |
| **Other Greenhouse Gas-reducing projects** | Up to $700,000 | | | |
| **Planning Grants (all funding areas)** | **Total expected funding** Up to $600,00 | **Grant cap: community engagement, research, curriculum development** $100,000 | | **Grant cap: technical assessments, feasibility studies** $200,000 |

# 2.2 FUNDING CATEGORY DETAILS

The 2026 Community Grants funding cycle will offer up to $60 million in grant funds across all grant types and funding areas. There are different funding limits (grant caps) and total funding allocations depending on the type of project being proposed. Please read each carefully as you identify the appropriate funding categories that apply to your proposed project.

## NOTE ON MULTI-CATEGORY PROJECTS

Each grant application must focus on a single, cohesive project or program. However, it is acceptable for a project to include elements from multiple PCEF funding categories.

- In such cases, the primary funding category is determined by the area receiving the largest share of the project budget.
- Make sure to read the guidance for Budget by Funding Category in this handbook.
- When submitting an application that includes multiple funding areas, applicants will need to fill out supplemental forms for each applicable funding category. Visit Section 3: Completing your grant application for more information.
- The primary funding category determines the grant cap of the application.
- The primary funding category sets the overall grant cap, but any funding requested for secondary categories must stay within their respective caps.
- *For example, if a project's primary category is Energy Efficiency (with a $5 million cap), and it also includes Green Infrastructure (with a $1 million cap), the portion allocated to Green Infrastructure cannot exceed $1 million. The total project budget can be up to $5 million*—not a combined $6 million—even if multiple categories are included.

## REGENERATIVE AGRICULTURE AND GREEN INFRASTRUCTURE

This section provides details on funding opportunities for Regenerative Agriculture and Green Infrastructure projects. Review the descriptions and funding limits to determine eligibility and scope for your application. Be sure to align your project with the outlined priorities and requirements to strengthen your proposal.

## REGENERATIVE AGRICULTURE

Includes projects that improve access to local food, fibers, and materials using practices that sequester carbon in the soil and support a healthier urban environment.

| Total expected funding | Large grant cap | Small grant cap | General operating support pilot grants |
|---|---|---|---|
| Up to $5.3 million | $1 million | $200,000 | 25% of organization's annual operating budget or $200,000, whichever is lower. |

## GREEN INFRASTRUCTURE

Includes planting, establishment, and maintenance of trees; restoration, depaving, planting, and establishing native plants and shrubs. All green infrastructure projects must reduce GHGs.

| Total expected funding | Large grant cap | Small grant cap |
|---|---|---|
| Up to $1.7 million | $1 million | $200,000 |

## KEY CONSIDERATIONS FOR APPLICANTS

**Regenerative Agriculture Implementation Projects.** Projects must improve access to local food, fiber, or materials using practices that support soil carbon sequestration and urban environmental health. Examples include:

- Production and distribution: Growing fresh food to be donated through local community organizations.
- Community connection: Using gardening to bring people together, celebrate culture, and teach food-growing practices.
- Food sovereignty: Supporting traditional or culturally specific methods of growing food, fiber, or medicine.

**General Operating Support Pilot for Regenerative Agriculture organizations**

- Available for organizations whose primary focus is local food production using regenerative agricultural practices.
- The amount covered is capped at 25% of operating costs or $200,000 annually, whichever is less.
- This general operating support is for three-year grants and applies only to organizations that pay their entire staff wages at or above the PCEF minimum wage.
- Organizations with an active General Operating Support Pilot grant are not eligible to apply for an additional General Operating Support grant until their current grant expires.
- General operating support pilot applications and regenerative agriculture implementation project applications must be submitted as separate applications.
- Organizations may submit a general operating support application and one for a Regenerative Agriculture implementation project.

**Green Infrastructure Implementation Projects.** Projects must reduce greenhouse gas (GHG) emissions and may include:

- Environmental services: Shade provision, temperature regulation, stormwater capture, soil restoration, and improved ecological function.
- Habitat restoration: Enhancing open spaces to support birds, native pollinators, and strengthen local food webs.
- Placemaking: Creating spaces for public use, gathering, learning, and community engagement.

**Project Duration and Scope**

- Planning projects may span 1 to 2 years.
- Implementation projects may span 1 to 5 years.
- General operating support grants may span 1 to 3 years.
- Maintenance costs are allowable but only during the active grant term. Projects cannot be extended solely to cover maintenance.

**Ineligible Activities and Expenses or Limitations**

Tree Planting on Public Property:

- Tree planting on public property is eligible but requires letter(s) of support from the relevant land management agency (e.g., PBOT, BES, Portland Parks).
- Street tree planting in the public right of way (ROW) is ineligible and cannot be included as part of a green infrastructure project scope. (See Strategic Program 8)

Regenerative Agriculture:

- Land acquisition (see Strategic Program 9).
- Hydroponics and aquaponics implementation projects
- Community Supported Agriculture (CSA) shares sourced from farms outside Portland, including Sauvie (Wapato) Island.
- Indoor agricultural cultivation projects that increase energy use without reducing GHGs.

**Electric Vehicle (EV) Purchases:** If your project includes the purchase of an EV to support regenerative agriculture or green infrastructure activities, that portion of your application falls under the Transportation Decarbonization funding category and you must complete the transportation decarbonization supplemental form in WebGrants and meet all related program requirements.

**Building and Renewable Energy (solar) Improvements:** If your project includes improvements to a permanent building (e.g. house, community facility, commercial space, etc.) or includes renewable energy installations (e.g. solar panels, battery storage), that portion of your application falls under the Energy Efficiency and Renewable Energy funding category and you must complete the energy efficiency and renewable energy supplemental forms in the WebGrants application and meet all related requirements. Note: construction related to smaller non-residential accessory structures (e.g. tool sheds, hoop houses, or temporary greenhouses) are not considered a primary building and are eligible as part of your regenerative agriculture and green infrastructure scope of work.

## TRANSPORTATION DECARBONIZATION

This funding area includes projects that support transportation electrification, and those that support mode shifting to biking, walking, and transit throughout the community. All transportation decarbonization projects must reduce GHGs.

| Total expected funding | Large grant cap | Small grant cap |
|---|---|---|
| Up to $12 million | $4 million | $500,000 |

## KEY CONSIDERATIONS FOR APPLICANTS

### Electric Vehicle (EV) Funding Requirements and Ineligible Activities and Expenses

- EV purchases must either replace an existing gas-powered vehicle currently in use by the organization or include a clear justification for fleet expansion. Justifications should explain why an additional EV is needed and how it supports PCEF's goals of addressing climate change while advancing social, economic, and climate justice.
- If purchasing up to three EVs, they must be acquired within 18 months of the grant agreement execution date.
- EV incentives for for-profit businesses require a 75% cost share, unless the EV is for specialized, climate-related work (e.g., an electric watering truck to be used for tree maintenance). If applying under this exception, you must provide a clear explanation and justification in your project narrative.
- PCEF funds may be used to fund EV purchases for private individuals. Eligible proposals would include electric vehicle incentives, of a reasonable amount, for income-qualified Portlanders, and following participant education and coaching, including financial literacy and electric vehicle purchasing preparation.
- PCEF will not fund any vehicle or infrastructure powered by carbon-based fuels, including biodiesel, diesel, gasoline, natural gas, and biogas.
- All EV funding requests must include a charging plan and a maintenance plan for vehicles and chargers beyond the grant term. Initial maintenance costs (e.g., warranties, training) may be included, but grants will not be extended solely for future maintenance or insurance costs.
- EVs and chargers must be operational within 1 year of grant execution (up to 2 years for smaller-scale projects). Longer timelines are allowed for large-scale projects with clear phasing.
- EV-related physical improvements (including vehicles) must occur within Portland city limits.
- Registration of an EV purchased must match the Secretary of State website, or a property owned, rented, or operated by the applicant.

### EV Charging Infrastructure and Security

- Applicants must describe a plan for charger and user security, which may include fencing, signage, lighting, cameras, or controlled access—these are allowable expenses.
- PCEF recognizes three levels of EV charging:
  - Level 1: Standard household outlet (110v)

- Level 2: Most common for grantees (240v, 40–80 amps)
- Level 3: Fast charging, rarely needed in PCEF-funded projects

**Right-of-Way (ROW) Projects**

- Projects that impact the public ROW must include a letter of support from the relevant permitting agency (e.g., PBOT, BES, Portland Parks).
- ROW projects are eligible only if:
  - The proposed improvement follows a prescriptive process, *or*
  - The applicant proposes a complementary non-prescriptive improvement with separate PBOT coordination.
- Planning grants for ROW projects must include clear engagement with PBOT to ensure the effort results in viable implementation.
- Funding may not be used for PBOT-led capital improvements; PCEF-funded projects must stand alone.
- Example of eligible ROW request: A bike bus program that could operate without—but would benefit from—safety improvements to nearby intersections.
- Example of ineligible ROW request: A project primarily focused on new bike lane construction that cannot proceed without that infrastructure.

**Active Transportation and Transit Projects**

- Must focus on non–single occupancy modes, such as walking, biking, rolling, e-bikes/scooters, or transit.
- Projects can focus on behavioral change and community engagement, even if they do not include physical infrastructure.

**Scope Limitations and Strategic Program Conflicts**

- Projects duplicating PCEF Strategic Programs in the CIP are not eligible, including:
  - SP 6: E-bike rebates
  - SP 7: Equitable clean transportation access
- Projects that complement or add to these strategic programs may be eligible if they clearly demonstrate how they build on or contribute to those efforts.
- Implementation applications projects must be shovel-ready where applicable.

## CLIMATE JOBS, WORKFORCE, AND CONTRACTOR DEVELOPMENT

This funding area includes projects that diversify and expand the pool of workers and contractors that produce goods or services that reduce or sequester greenhouse gas emissions. There are three general areas of work within the workforce and contractor development funding area.

### WORKFORCE TRAINING OR CONTRACTOR DEVELOPMENT

**Workforce training** includes BOLI certified pre-apprenticeship programs, apprenticeship, and other job training programs that help to diversify the climate workforce with a focus on programs with direct job placement and workers in the construction trades.

**Contractor development** includes technical assistance and other support, such as business development to help support and grow diverse contractors and businesses that provide climate-focused goods and services.

| Total expected funding | Large grant cap | Small grant cap |
|---|---|---|
| Up to $7.9 million | $1.5 million | $500,000 |

### YOUTH WORKFORCE EXPOSURE AND EDUCATION

Includes youth (ages 14-26) education and engagement that increases knowledge of, and interest in, careers in climate work.

| Total expected funding | Grant cap |
|---|---|
| Up to $800,000 | $400,000 |

### KEY CONSIDERATIONS FOR APPLICANTS

**Geographic boundaries.** Workforce and Contractor Development implementation projects are the only PCEF-funded projects that can take place outside the Portland City limits. Trainings can take place anywhere in our "Work-shed" of the Metropolitan Statistical Area: Multnomah, Washington, Clackamas, Columbia, Yamhill, Clark, or Skamania counties. However, any PCEF-funded physical improvements must take place in the City of Portland.

**Allowable costs for contractor support.** Expenses necessary for starting or scaling a business in the clean energy sector may be eligible under contractor support grants, including expenses related to capitalizing business loans when in line with PCEF goals and requirements.

**Participant support in workforce development**

- PCEF funds may be used to support recruitment, retention, and success of workforce program participants.
- This includes payments made to or on behalf of participants for costs such as housing, transportation, childcare, tools, union dues, or participation stipends.
- The need for such payments should be clearly established (e.g., through income eligibility) and must be proportional to the level of program participation. For example, a participant attending one day per week should receive support appropriate to that level of engagement.

**What is a Pre-apprenticeship?**

A pre-apprenticeship is a program designed to prepare individuals for entry into a formal apprenticeship. These programs offer foundational training in areas like math, literacy, and industry-specific skills, as well as workplace readiness, safety practices, and soft skills such as communication and teamwork. Pre-apprenticeships often include mentorship and help participants understand the expectations of registered apprenticeship programs. They also provide valuable networking opportunities with employers and trades professionals. For individuals new to the field, pre-apprenticeships offer a critical bridge into skilled trades careers. PCEF prioritizes funding pre-apprenticeship programs that have been certified by Oregon's Bureau of Labor and Industry (BOLI), those in the process of becoming BOLI certified, or work done in partnership with such program

- For information on how to start a BOLI registered pre-apprenticeship, refer to the BOLI Pre-apprenticeship application toolkit
- To find out about existing BOLI certified pre-apprenticeship programs, refer to the BOLI Pre-apprenticeship programs page

**Ineligible Activities and Expenses**

- Post-secondary education scholarships are limited to certification programs with direct climate work connection (e.g., Limited Renewable Energy Technician (LTR) license or arborist license). Scholarships for more general education and for four-year degrees will not be considered.
- Workforce training programs without a fully developed curriculum are not eligible for implementation grants but can apply for a planning grant to develop curriculum.

- Rent and utilities are only eligible expenses when they directly support grant-funded activities. For example, if you are applying to fund 100% of a project that will use 50% of your space during 50% of your operating hours, you can request up to 25% of your total rent and utility expenses.

## SCORING CRITERIA SPECIFIC TO WORKFORCE AND CONTRACTOR DEVELOPMENT GRANTS

In addition to scoring criteria that apply to all PCEF grants including organizational information, team experience and qualifications, likelihood of succeeding, etc., there are a few criteria that are specific to workforce and contractor development applications.

**Program will support one or more PCEF goals of:**

- **Diversifying workforce** in the green economy through appropriate training, job placement and support for PCEF workforce priority populations.
  - Full points - Program curriculum is certified by an entity that is widely recognized in relevant industry, e.g., BOLI, Building Performance Institute.
  - Note that partial points are available for uncertified programs and curriculum that prioritize and actively ensures workforce diversity, establishes partnerships with diverse communities, organizations, and educational institutions, and has established partnerships for placement of graduates.
- **Diverse contractor** start-up, stabilization, growth, pivot in businesses focused on climate related goods and services.
  - Full points - Program supports delivery of climate related goods and services. Program thoroughly evaluates business needs and the aspirations of the owners, delivering a full suite of tailored business assistance, support, and grant funding. The program aims to broaden the base of contractors in the green economy, prioritizing beneficiaries from PCEF's priority communities.
- **Youth education and/or exposure** – improved youth knowledge of, and readiness for, careers in climate work.
  - Full points - Program offers meaningful youth curriculum on climate work and career pathways, examples include hands-on workshops, internships, and mentorship opportunities with industry professionals.
- **Project will benefit PCEF priority populations.**
  - Full points for projects where all beneficiaries are PCEF workforce priority populations.

## ENERGY EFFICIENCY AND RENEWABLE ENERGY

Includes renewable energy, battery storage, and energy efficiency projects on/in residential buildings, nonprofit occupied commercial buildings (can be privately owned), and community solar that benefits low-income Portland residents. All energy efficiency and renewable energy projects must reduce GHGs.

| Total expected funding | Large grant cap | Small grant cap |
|---|---|---|
| Up to $31 million | $5 million | $2 million |

## KEY CONSIDERATIONS FOR APPLICANTS

**PCEF Energy Efficiency and Renewable Energy Guidance.**

All energy efficiency and renewable energy projects will be completed in accordance with PCEF requirements for your project type. See Eligible Measures and quality assurance below for more information.

**Construction Timeline**

- For all multi-unit (multifamily) housing and commercial projects, construction must be completed within three years of the grant agreement's effective date. For grants that include multiple project sites, the project must complete construction within three years.
- Budgets must reflect no more than three years of expenses.

**Ineligible Activities and Expenses**

The following projects are not eligible for funding under Community Grants in this category:

- Energy efficiency improvements for more than 50 homes (e.g., single family, single unit housing, duplexes, triplexes, quadplexes) per year (see Strategic Program 3)
- Energy upgrades in new construction or redevelopment of regulated multi-unit housing with 20+ units (see Strategic Program 1)
- For-profit commercial buildings (see Strategic Program 4)
- Energy upgrades at public schools (see Strategic Program 16)
- Improvements to government-owned facilities used for severe weather response
- Standalone climate resiliency measures that increase energy use without reducing GHGs.

- Windows and lighting installed without other qualifying energy measures (Visit Energy Efficiency and Renewable Energy Resources for more information).
- Non-electric mechanical systems or appliances.
- Land acquisition costs (See net-zero and community solar sections below for exceptions).
- Projects that have active applications for PCEF funding for the same project, through a different PCEF program or funding opportunity.

**Net Zero Projects.** To qualify as net zero, projects must be all-electric, new construction, and meet one of the following criteria:

- Complete a whole building energy model and size solar to match predicted electric use.
- Use ENERGY STAR Portfolio Manager to analyze one year of actual electric use and size solar accordingly (for retrofit projects, analysis must follow EE upgrades).
- Certify through Earth Advantage Zero Energy or Living Building Challenge Zero Energy.
- Successfully complete Energy Trust of Oregon's Path to Net Zero or EPS New Construction Net Zero programs.
- Projects planning to pursue the net zero option should refer to the Renewables (Solar+battery) section below to ensure they understand expectations.

**Sample Budgets and Additional Guidance**

- In your application, it is helpful if you can provide all reasonably available budget details appropriate to your project type. This could include specific measure costs (see Appendix D), full project budget details or pro-formas, sources and uses of funds, and known energy incentives or rebates.
- For equipment that you anticipate contractors will purchase, include those costs under the Contracts line item in your budget. Do not include these items in the Materials line item unless you plan to self-purchase the equipment.
- See Appendix D - Sample EE/RE Detailed Budget for a sample energy efficiency and renewable energy project budget for measure-specific projects. This sample budget may not be helpful for qualifying net-zero projects. Note: Competitive implementation grant applications in this funding category are typically far enough along in their planning process to include a budget that is of a similar level of detail as the one in Appendix D.

**Life, Health, and Safety Improvements and the 70/30 Budget Split.** For retrofits in existing buildings and homes, PCEF can fund a portion of construction cost for life, health, and safety improvements. PCEF will not fund life, health, and safety measures in new construction projects. Below are additional guidelines for this requirement.

- At least 70% of total hard construction costs must go toward eligible energy efficiency and/or renewable energy (EE/RE) measures.
  - Refer to the eligible measures to see which upgrades count toward the 70% EE/RE category.
- Up to 30% of the total hard construction costs may support life, health, and safety improvements that:
  - Enable or are required for the EE/RE measures (e.g., asbestos or mold mitigation, electrical upgrades, roof replacement)
  - Address other critical building upgrades, including ADA upgrades if life, health and safety funds remain after energy upgrade enabling repair needs have been met
- If additional non-PCEF funding (leverage) is confirmed for EE/RE measures that are part of the PCEF project proposal, up to 50% of PCEF hard construction funds may be used for life, health, and safety improvements, as long as the total hard construction budget across all bunding sources maintains the required 70% investment in energy scope. *PCEF will not count outside funding for measures beyond the PCEF-funded scope*. Examples:
  - $50,000 PCEF grant with no leverage → Up to $15,000 (30%) is allowed for life, health, and safety improvements
  - $84,000 total hard construction cost, including $34,000 in leverage for eligible measures in the PCEF grant request → Up to $25,000 (50%) of PCEF funds is allowed for life, health, and safety improvements, provided the total budget for EE/RE work is at least 70% of total hard construction budget.

## ELIGIBLE MEASURES AND QUALITY ASSURANCE

Applicants should review these requirements before submitting their application. Visit this page: Energy Efficiency and Renewable Energy Resources.

**Eligible measures.** There are minimum requirements for eligible energy efficiency and renewable energy measures and how funding can be applied to other improvements. Please note that the eligible measures list is updated annually. Before applying, applicants should review the eligible measure lists that are relevant to your proposed project.

**Quality assurance.** All PCEF-funded clean energy implementation projects are required to participate in a quality assurance (QA) process tailored to the type of project. PCEF's QA process is designed to promote safety, prevent costly mistakes, minimize delays, and set projects up for success from the start.

- If your project is selected for funding, PCEF staff will begin with a scope review before any work begins. We strongly recommend that organizations do not purchase materials or obtain permits until the scope review is complete and approved.

## CONTRACTOR GUIDANCE AND INSTALLATION REQUIREMENTS

You do not need to have a contractor in place to apply for a PCEF grant. However, all PCEF-funded construction must follow PCEF installation requirements. Visit this page: Energy Efficiency and Renewable Energy Resources to learn more. Applicants should review these requirements before submitting their application. There, you'll find information related to the following topics, and more:

- Installation Checklists: Contractors must use PCEF-provided checklists that outline the technical specifications and construction steps required to properly install clean energy measures.
- Heat Pump Sizing: All heat pumps in single unit housing must be properly sized to maximize efficiency and cost savings.

## RENEWABLES (SOLAR+BATTERY)

Applicants should review renewables requirements before submitting their application. To review requirements in detail, visit Energy Efficiency and Renewable Energy Resources.

| Renewable type | PCEF will fund | PCEF will not fund |
|---|---|---|
| Solar | ○ Rooftop solar on homes, and multi-unit and commercial buildings.<br>○ "Offsite" and ground-mounted solar for sites without sufficient roof space or solar resource.<br>○ Community solar. | Offsite solar outside of Portland, OR. |
| Battery storage | On-site critical load backup for single and multi-unit housing, and commercial buildings. | Battery storage without solar. |

PCEF projects with renewables may choose from one of the following funding options:

1. **Standard participation path:** PCEF will pay for the installed cost of eligible measures. In this approach, at least 70% of the renewable installation costs must be for renewable measures. Up to 30% of total renewable installation costs may be for necessary life, health or safety upgrades which enable the renewable install.
2. **Net zero path:** For new construction projects that install solar that generates at least as much electricity as the building uses each year (net zero), PCEF will pay up to 25% of the total development cost for a net zero project. For single- and multi-unit housing projects, **PCEF will fund this 25% amount up to $150,000 per home or unit.** To inform your net zero budget request, please refer to the Renewables Participations Guidelines (available on the Energy Efficiency and Renewable Energy Resources page) to see eligible expenses. Note: PCEF wage requirements are still applicable for all eligible expenses, including contracted costs. For net zero projects, PCEF wage requirements apply to all contracted work.

## OTHER GREENHOUSE GAS-REDUCING PROJECTS

Includes projects that do not fall into one of the above categories but supports program goals of addressing climate change while advancing social, economic, and climate justice. The sections asks applicants to consider how their initiative will reduce GHGs.

| Total expected funding | Grant cap |
|---|---|
| Up to $700,000 | N/A |

Examples of previously funded Other GHG-Reducing projects include waste reduction initiatives—such as educational programs on repairing home appliances—as well as community education on energy efficiency and renewable energy, and the development of a clean energy resource website.

## PLANNING GRANTS (ALL CATEGORIES)

Planning grants support organizations in conducting assessments and other preparatory activities needed to develop a full project proposal. These grants are intended for work that lays the foundation for future implementation. Visit Planning Grants for additional information.

| **Total expected funding** | **Grant cap:** community engagement, research, curriculum development | **Grant cap:** technical assessments, feasibility studies |
|---|---|---|
| Up to $2 million | $100,000 | $200,000 |

# 2.3 USES OF PCEF FUNDS

This section provides general guidance on how PCEF funds may be used. Please refer to the individual funding area sections earlier in this document for category-specific restrictions or requirements. While not a comprehensive list, this section addresses common questions about funding eligibility, including expenses that are often ineligible under other grant programs but may be critical for achieving climate, social, and economic justice outcomes.

If you have questions about whether a particular cost is allowable, please contact cleanenergyfund@portlandoregon.gov.

## ALLOWABLE EXPENSES: WHAT PCEF FUNDING CAN BE USED FOR

Find additional guidance on budget line-item categories and eligible expenses in the General Budget Guidance section of this handbook.

**Materials, supplies, and equipment** purchases must be in service of implementing the proposed project. PCEF does not require lowest cost budgeting; applicants should consider the social, economic, and environmental impacts of purchasing choices.

**Insurance costs** that are additional and a direct result of requirements associated with the PCEF grant are an allowable expense for the first grant year. Grantees would be expected to pay for all insurance costs through their "overhead" funding for subsequent years.

**Project reporting.** Reports, plans, and other material developed using grant funds are an allowable expense and considered public information. In addition to standard reporting that is required of all PCEF grantees, PCEF applicants are encouraged to integrate culturally appropriate and meaningful ways of communicating and reporting about their project. Examples could include works of performance or visual art, etc.

## ALLOWABLE EXPENSES, WITH SPECIFIC LIMITS AND/OR RESTRICTIONS

**Initial maintenance expenses.** PCEF can only pay for maintenance costs incurred during the active grant period. Grant agreements will not be extended solely to cover unanticipated maintenance expenses, and PCEF does not provide upfront funding for future maintenance needs. However, grantees are encouraged to include initial maintenance-related expenses as part of their project budget, such as prepayment of a service warranty, HVAC maintenance contracts, contracted tree establishment care, staff time to develop a maintenance plan, or maintenance training for staff.

**Fiscal sponsors.** Organizations that apply for PCEF funds with a fiscal sponsor may allocate up to 10% of their grant application budget for fiscal sponsor fees.

**Overhead costs** (also sometimes called administrative costs) refer to general costs of operations such as rent, utilities, administrative staff, insurance, legal, website, and telecommunications. Overhead costs are auto calculated for all applicants.

The overhead amount is determined by a calculation of specific line items:

- 10% of the for travel, materials, and contracts line items, plus
- 20% of the personnel line items
- All other budget line items are not included in the overhead calculation.
- Note that applications with a fiscal sponsor may have a combined overhead rate up to 25%.

**General operating costs** are only an eligible expense for organizations whose primary purpose is regenerative agriculture and local food production in Portland, Oregon. The amount covered is capped at 25% of operating costs or $200,000 annually, whichever is less. General operating support grants are for three-year terms and apply only to organizations that pay their entire organization's staff wages at or above the PCEF minimum wage.

**Embodied carbon** – If your project includes embodied carbon as a GHG reduction measure please submit the details through the 2026 Community Grants Applicant Question form to confirm whether it qualifies as an allowable expense before submitting your application.

**Life, health, and safety improvements.** All eligible projects may use up to 30% of the total construction budget on each site to address life, health, or safety issues.

**Grant funds invested in commercial properties** that are privately owned by individuals or for-profit organizations may be allowed in limited circumstances (e.g., if a nonprofit holds a long-term lease or as part of a contractor training program). If you are exploring potential

project that includes investment in privately held commercial property with PCEF funds, please please submit the details through the 2026 Community Grants Applicant Question form for consultation on whether it would be considered an allowable expense.

**Projects in the Right-Of-Way (ROW)** are only eligible with a letter of support, including contact information, from the government section with authority over relevant permitting and authorization. Government sections may include Portland Bureau of Transportation (PBOT), Bureau of Environmental Services (BES), Portland Water Bureau, Portland Parks, or other bureaus.

**Land and/or building acquisition** is only an allowable expense in net-zero and community solar projects. If deemed eligible, acquisition expenses must occur within grant agreement period. No other land acquisition is eligible in Community Grants. Note: Community Grants does not allow any land acquisition costs for regenerative agriculture as it is supported in Strategic Program 9 outlined in the CIP.

## NOT ALLOWABLE USE OF FUNDS

Following is a list of activities that are not allowable within 2026 Community Grants. Please refer to the individual funding area sections earlier in this document for category-specific restrictions or requirements. Some activities not allowed within Community Grants are funded through one of the strategic programs in the CIP. You can find more details on all strategic programs in the CIP.

- Expenses for technology that is not commercially available are not allowed.
- Any physical improvements outside of the City of Portland is not eligible for funding.
- Costs that duplicate services or funding from another PCEF Strategic Program or outside funding source (e.g., energy incentives). Projects may leverage other funding but may not use these sources to exceed 100% of the cost for the PCEF-funded scope items.
- Reimbursements for costs and activities completed before the grant agreement effective date.
- Expenses not clearly tied to the proposed project goals, milestones, or activities.
- Pass-through funding to ineligible entities - An eligible applicant may not apply for funding on behalf of, or to serve as a pass-through to, an organization or entity that does not meet PCEF eligibility requirements.

## 2.4 IMPORTANT GRANT REQUIREMENTS TO NOTE

**Transfer of property.** Some types of property (e.g., real property and personal property valued above a certain threshold) obtained with PCEF funds, either in full or in part, may require the grantee to notify the City and receive approval for transfer ownership of the property. The City's approval to transfer ownership will not be unreasonably withheld.

**Rent stability**. PCEF-funded improvements cannot be used as a basis for rent increases.

**Funding only within the grant agreement period.** Reimbursement for items procured or work completed prior to the effective date of the grant agreement are not an allowable expense.

**Insurance Requirements.** If selected for funding, grantees are required to carry insurance. See Appendix B: Insurance Guidance for Grantees for additional information.

### PCEF WAGE REQUIREMENTS

All workers paid with PCEF funds must earn at least 180% of the area minimum wage. This rate is updated annually on July 1. For the period July 1, 2025, through June 30, 2026, the minimum wage for PCEF-funded work is $29.34 per hour.

Additionally, certain construction projects are subject to prevailing wage requirements, which PCEF applies at a lower threshold than the State of Oregon. Click here for additional information about PCEF wage requirements.

Note on staff wages: PCEF will review personnel wage rates to ensure they align with the size and scope of the organization and proposed project. If a wage is flagged during financial review as potentially excessive, PCEF may request additional documentation or justification. Wage requests may be denied if the justification is deemed insufficient or inconsistent with program standards.

### APPRENTICESHIP UTILIZATION REQUIREMENTS

All PCEF funded multi-site construction projects and PCEF funded single-site projects with greater than $350,000 of PCEF resources for hard construction costs (excluding subcontracts less than $100,000) must adhere to apprenticeship utilization requirements.

**Apprentice utilization requirements:** A minimum of 20% of the hours worked, by trade, must be worked by state registered apprentices throughout the duration of the project. Contractors must be registered as a training agent with the relevant apprenticeship program and the Oregon Bureau of Labor and Industry (BOLI) if apprentices are being utilized.

Information about becoming a registered training agent can be found by contacting the apprenticeship training program relevant to the contractor's trade. A list of training programs is available on the BOLI apprenticeship website.

## INVOICING AND REPORTING REQUIREMENTS

If selected for funding, your organization will be responsible for meeting PCEF's invoicing and reporting requirements. These requirements support transparency and accountability in the use of public funds and should be considered when planning project staffing and administrative capacity. Key expectations include:

- Quarterly reporting on project activities, progress toward milestones, and relevant data based on your project's funding category.
- Detailed expense documentation for all grant spending, including receipts, invoices, payroll records, and other supporting materials.
- Demographic and wage reporting for all grant-funded staff and contractors. Contractors must also report demographic information for their company ownership.

Plan for these requirements when preparing your application and assembling your team.

### PCEF ADVANCE POLICY

For organizations that do not have the necessary funding available to pay for expenses on a reimbursement basis, we also offer the option to advance funds on a quarterly basis with program approval. **Important:** Not all organizations are eligible to receive advanced funds. The advance payment option requires program approval.

# SECTION 3: COMPLETING YOUR GRANT APPLICATION

Use this section for guidance on completing and submitting your grant application. It includes valuable tips to support you as you draft, review, and finalize your materials. We strongly encourage you to read this section carefully, as it breaks down key parts of the application process and provides detailed instructions throughout.

# 3.1 WEBGRANTS DETAILS AND TIPS

For WebGrants support, including video tutorials, visit the Technical Assistance webpage.

## WHAT IS WEBGRANTS?

WebGrants is an online grants management software. It is used by applicants, grantees, and grant managers for all phases of grants, including applications, awards, payment, and reporting. Our grant programs have transitioned to WebGrants so organizations and community members can access and manage all City grants in one location.

**Access the WebGrants website here: Access WebGrants**

## DEADLINE TO REGISTER IN WEBGRANTS

Because it will take 1-2 business days for your registration to be approved, the deadline to register for an account is May 13, 2026 which is two weeks before the application closes. The deadline to apply for a grant is 5:00PM on May 27, 2026

## WEBGRANTS PROCESS OVERVIEW AND TIPS

- To submit your application, you will first need to complete and save all required entries on the General Information Form, Application Form (Implementation or Planning, as appropriate), and Budget Form, and mark each of those forms "Complete."
- For Implementation applications, you will then need to go through the forms for every funding sub-category, answering Yes or No at the top of the form on whether the area applies to your project, and marking the forms Complete as you go. You must mark all the funding category forms "Complete", whether they apply to your project, before you will be able to submit the application.

**Plan ahead and leave plenty of time.** We suggest drafting your application materials outside of WebGrants and entering them once you are ready.

- We provide Grant application templates on the Technical Assistance webpage.
- Be sure to allow plenty of time to enter your application into WebGrants. Even once your application content is done, saving all the entries and uploading required forms can be a lengthy process.
- Your application does not need to be completed in WebGrants all at once. You can stop working on your application at any time, save it, and come back to it later.

**Save often and navigate carefully.**

- Make sure to click 'Save Form' regularly. The application does not autosave.
- When you save successfully, WebGrants will navigate you to the top of the form you are on. You will then have to click "Edit Form" again to proceed with entries, and it will navigate you to the top of the form again.
- If you click save and the form does NOT navigate you back to the top, it hasn't saved – almost certainly because you haven't completed a required field. Go find the field and complete it, then you will be able to save.
- Do not use your browser's 'back' button. It will remove you from the WebGrants system and changes may not be saved. There is a back button at the top of the WebGrants page if you need one.

**Can't save? Can't enter information?**

- If you press save and nothing happens, check your previous work to be sure that all red questions are answered completely. If you don't see any blanks, check that you haven't left a digit off a required phone number or Zip Code, entered an invalid email address, or made a similar unacceptable entry.
- If you need to enter information in a table, but don't see an "Add Row" button and can't make an entry, it means you need to save your work – then the button will appear.

**Read carefully and check your numbers**. WebGrants does not check for compliance with all application requirements, even though it does have checks built in for some of them. Take special note of these potential issues:

- Funding Caps. WebGrants will not check that your request is within the allowable limit for your primary funding category. Be sure that your request, including the auto-calculated overhead, is within your application's primary funding category limit.
- Exceeding maximum request limit. If you request more than the maximum award amount allowable across all applications ($5 million), WebGrants will still allow you to save and mark all forms complete but will not allow you to submit your application.
- Follow-up questions. Some questions that request follow-up details are not required by WebGrants, but may be necessary for you to fully explain your project or your organization. Take care to complete these when they apply to you.
- Check character limits. If you are pasting into a text field and attempt to paste more than the character limit, WebGrants will cut your text off at the character limit without warning you. When typing into a text field, WebGrants will stop you from typing more when you reach the character limit.

- Add rows to distinguish multiple budget items. If your budget includes several line items (e.g., contracted support for multiple kinds of work), add rows to clearly separate costs.

**Submitting two Implementation or Planning applications?**

- If your organization is submitting two Implementation or two Planning applications, you can save time this way:
  - From the Funding Opportunity Page for Community Grants 2026 Implementation or Planning, Start a New Application. Complete and save sections 1-3 of the application form with your organization's information.
  - Then, back on the Funding Opportunity page, you can click "Copy Existing Application" to create duplicate an application with the same general information.
  - Proceed to enter the details of both projects in their respective applications.
- You cannot do this if you are submitting one Implementation and one Planning application, because they are separate Funding Opportunities.

### REQUESTING SUPPORT WITH WEBGRANTS

- Find additional resources on our Technical Assistance webpage.
- If you still have questions, you can complete this form to submit a question.

## 3.2 PLANNING GRANT APPLICATION GUIDANCE

This section provides guidance related to the planning grant application. Use it as a guide while drafting your responses to ensure you provide the information reviewers need to understand your project, its purpose, beneficiaries, and planning approach. Clear, complete answers to each prompt will help demonstrate how your proposal supports climate and community goals.

On our Technical Assistance webpage, you'll find template versions of all application documents, including character limits, for you to download, draft your responses, and collaborate with your team.

Review our Planning Grant Scoring Criteria to understand how applications are evaluated.

### PLANNING GRANT - SECTION OVERVIEW

The planning grant application consists of eight sections, all of which are required for all applicants. Below, we provide additional guidance on select sections that address some of the most frequently asked questions from applicants.

- Section 1: Application Eligibility
- Section 2: Applicant Organization Information
- Section 3: Financials
- Section 4: Project Description
- Section 5: Project Milestones and Schedule
  - Section 5.A: Project Challenges and Requirements
- Section 6: Experience and Qualifications – Internal Staff
  - Section 6.A: Experience and Qualifications – External Team Members
  - Section 6.B: Experience and Qualifications – Unknown Team Members
- Section 7: Workforce and Contractor Benefits
- Section 8: Applicant Organization References

## SECTION 4: PROJECT DESCRIPTION

- Describe the issue that you hope to address.
  - How was the issue or opportunity identified, and how will the planning grant help address this issue or opportunity?
- Describe desired outcomes and beneficiaries of the proposed planning project.
  - What will the outcome or result of this planning grant be?
  - Who will be the primary groups of people, or community(s), who will benefit from the outcomes or results of the planning grant?
- Describe the planning process (tell us what you are going to do) and how it advances social, economic, and climate justice. As applicable, include the following elements:
  - Community engagement - How will you connect with the community who will benefit from the project that is being planned and how will this community be involved in the planning process? We recognize that projects and programs require different amounts and types of community involvement; tell us about the community involvement that is relevant to this project.

## SECTION 5: PROJECT MILESTONES AND SCHEDULE

This section asks applicants to provide a summary description of your project milestones, activities that will support achieving these milestones, and an estimated schedule for completing each milestone. **Milestones** are significant markers in a project—such as decision points, events, or completed phases of work. **Activities** are the specific steps you will take to reach each milestone.

Provide **estimated completion dates** for each milestone, either quarterly or biannually. These dates should reflect the time to carry out your planning work within the allowable grant period.

Reminder on planning grant levels:

PCEF offers two levels of planning grant funding. Your project scope should align with the appropriate level and budget request.

- Up to $100,000 for planning activities such as community engagement, general research, or curriculum development.
- Up to $200,000 for proposed projects that include highly technical planning activities such as construction feasibility studies, energy modeling, or fleet assessments. This higher cap reflects the additional cost and expertise for in-depth technical planning.
- Note: Final funding amounts will be validated by PCEF staff based on the scope of work.

Example Milestone Schedule: Community Engagement on Regenerative Agriculture and Green Infrastructure

| **Milestone** | **Activities to support milestone** | **Estimated completion** |
|---|---|---|
| 1. Develop outreach strategy and materials | 1. Meet with community partners to co-design engagement approach<br>2. Create culturally specific outreach materials<br>3. Confirm engagement venues and translators | February 2027 |
| 2. Conduct community engagement sessions | 1. Host 3 listening sessions with community members<br>2. Facilitate small group conversations and surveys<br>3. Document community priorities and feedback | June 2027 |
| 3. Analyze input and identify opportunities | 1. Review session data and summarize themes<br>2. Identify common interests and barriers | November 2027 |
| 4. Develop summary report and planning recommendations | 1. Draft findings and proposed next steps<br>2. Validate with community partners<br>3. Finalize report | January 2028 |
| 5. Close out grant | 1. Submit final invoice for payment<br>2. Submit final report, including deliverables, photos, and required documents | March 2028 |

## SECTION 7: WORKFORCE AND CONTRACTOR BENEFITS

For guidance on completing this section please visit this section of the applicant handbook for more information: Workforce and Contractor Benefits.

# 3.3 IMPLEMENTATION GRANT APPLICATION GUIDANCE

This section provides guidance related to the implementation grant application. Use it as a guide while drafting your responses to ensure you provide the information reviewers need to understand your project, its purpose, beneficiaries, and planning approach. Clear, complete answers to each prompt will help demonstrate how your proposal supports climate and community goals.

We have template versions of all application documents, including character limits, for you to download, draft your responses, and collaborate with your team. Find those documents on our Technical Assistance webpage.

Review our Implementation Grant Scoring Criteria to understand how applications are evaluated.

## IMPLEMENTATION GRANT – SECTION OVERVIEW

The primary implementation grant application consists of ten sections, all of which are required for all applicants. Below, we provide additional guidance on select sections that address some of the most frequently asked questions from applicants.

In addition to the primary application, you will also be required to complete one or more supplemental forms, depending on the funding categories included in your proposed project. For details, see the Supplemental Forms Guidance section.

- Section 1: Application Eligibility
- Section 2: Applicant Organization Information
- Section 3: Financials
- Section 4: Project Elements
- Section 5: Project Narrative
- Section 6: Project Milestones and Schedule
  - Section 6.A: Project Challenges and Requirements
- Section 7: Experience and Qualifications – Internal Staff
  - Section 7.A: Experience and Qualifications – External Team Members
  - Section 7.B: Experience and Qualifications
- Section 8: Workforce and Contractor Benefits
- Section 9: Applicant Organization References
- Section 10: Partner References

## SECTION 4: PROJECT ELEMENTS

### 4.3 BUDGET BY FUNDING CATEGORY

Question 4.3 asks you to estimate how your total requested budget is distributed across the applicable PCEF funding categories. Your response determines the primary funding category for your project, which then determines the grant cap that applies to your application.

Please make your best estimate based on the scope of work and your budget. Be sure to account for all proposal costs, including outreach, administrative expenses, and indirect costs. The category with the largest share of the budget will be considered your primary funding area. The total across all categories must equal 100%. If you are unsure how to categorize certain costs, use your best judgment and provide explanations in your budget narrative where needed.

**Important notes**:

- Your budget line items should reflect these percentages to ensure consistency between your narrative and budget.
- Please enter rows for costs for each line item in your budget. If your scope includes subcontracted services, please enter a row for each contractor.
- If your project includes multiple funding categories, be mindful of the individual funding caps that apply to each one. For more guidance, see the Note on Multi-Category Projects section of this handbook.

## SECTION 5: PROJECT NARRATIVE

The prompts in this section help us understand what you propose to do, who will benefit, and what the outcomes of the project will be. This section should be uploaded as one pdf or word document. There is no page limit or requirement. We also have an optional video upload link, if you want to include a video in addition to your written narrative.

**Energy efficiency, renewable energy, regenerative agriculture, green infrastructure, transportation decarbonization, other GHG projects:** Include how the project will reduce carbon through either greenhouse gas emissions reduction or sequestration and how the project promotes social, economic, and climate justice. In your response, include how you identified the need for this project, your project goals and expected outcomes, how you will accomplish these goals and outcomes, and who are the primary beneficiaries.

**Workforce and contractor development projects:** If the project includes workforce training or contractor development include how the project will contribute to the development of diverse workers and/or businesses that are engaged in addressing climate change and what has informed your strategy. Please indicate if the program is certified by an entity widely

recognized within the industry. If the program is not certified please explain if certification is being sought, and if not, the reason(s) why.

**Project beneficiaries:** Describe who your project is intended to benefit, how you will engage your intended beneficiaries, and what benefit they will receive. Be sure that your response includes the elements below:

- Describe how many people the project will benefit and how they reflect PCEF priority communities.
- If the proposed project will result in reduce costs (e.g., utility bills, transportation costs) please describe the following:
    - What cost is being saved? (e.g., energy utility bills, food cost/bill, transportation costs)
    - Who will benefit from the cost savings, how much are they saving, over how much time? Your response should include an estimated dollar amount per beneficiary per timeframe (e.g., $1,000 savings per household per month)
    - How did you estimate these savings?
- Describe how you plan to engage the intended project beneficiaries. If applicable, note how engagement activities are informed by cultural competence, principles of inclusion and/or collaboration. If your project will include events, workshops, targeted outreach, or other engagement strategies please describe them in your answer, even if you haven't finalized the details of your plans.

## SECTION 6: PROJECT MILESTONES AND SCHEDULE

This section asks applicants to provide a summary description of your project milestones, activities that will support achieving these milestones, and an estimated schedule for completing each milestone. **Milestones** are significant markers in a project—such as decision points, events, or completed phases of work. **Activities** are the specific steps you will take to reach each milestone.

Please provide **estimated completion dates** for each milestone, either quarterly or biannually. These dates should reflect the time it will take to carry out your planning work within the allowable grant period.

Example Milestone Schedule: Energy Efficiency for Single-Unit Housing

| **Milestone** | **Activities to support milestone** | **Estimated completion** |
|---|---|---|
| 1. Identify 20 homes for efficiency retrofits | 1. Outreach to community intended to benefit from project<br>2. Advertise on social media<br>3. Screen and select participants | March 2027 |
| 2. Hire contractor(s) to complete retrofits | 1. Draft request for bids<br>2. Advertise through x, y, and z channels<br>3. Select contractor | June 2027 |
| 3. Develop scope of work for each home | 1. Perform 20 energy audits<br>2. Create budgets and work orders for each site<br>3. Request scope review by PCEF quality assurance provider | December 2027 |
| 4. Complete energy retrofits on eligible homes | 1. Work with contractors and home occupants to schedule work and provide education on new systems<br>2. Facilitate on-site inspections with PCEF quality assurance provider | April 2028 |
| 6. Close out grant | 1. Submit final invoice for payment<br>2. Submit final report, including deliverables, photos, and required documents | August 2028 |

## SECTION 8: WORKFORCE AND CONTRACTOR BENEFITS

Guidance for Completing the Workforce and Contractor Equity Section

This section of the application asks about your approach to workforce and contractor equity. It is intended to apply to any grant-funded work involving paid staff, contractors, or subcontractors—not just traditional construction trades.

Important note: Applicants sometimes overlook this section if their project doesn't involve prevailing wage trades. However, these questions are still relevant for many types of work, including farming, planting, education, community engagement, and more.

Keep the following guidance in mind as you prepare your responses:

- If your project will involve any paid workers or contractors, you should complete this section. This includes work performed by your organization, as well as work contracted out to others.
- If your organization will not be employing or contracting anyone for the project, you may state that in your response.
- If hiring or contracting hasn't occurred yet, you should describe your intended recruitment strategies and workforce practices.
- Questions about benefits refer to workers not covered by prevailing wage laws, such as those in agriculture, green infrastructure, education, or outreach.

We encourage applicants to provide as much detail as possible based on your current plans. If some details are still being developed, you can explain your intended approach and note any uncertainties.

Additionally - The CIP establishes minimum contractor and workforce utilization goals for all grants with hard construction costs of greater than $350,000. If you are selected to receive a PCEF grant, you will be required to agree to the requirements of the Workforce and Contractor Equity Agreement, which you will find in Appendix A of this handbook.

## SUPPLEMENTAL FORMS GUIDANCE

Applicants are required to complete a supplemental form for each funding category included in their proposed project. These forms gather key technical details to help staff better understand your project and to calculate greenhouse gas (GHG) reduction estimates.

- Note: Applicants are not expected to calculate their own GHG reduction estimates. Instead, PCEF staff apply a consistent formula across all applications using the data provided in the supplemental forms to generate a GHG score.
- If your application includes components from multiple funding categories, please be sure to review the Note on multi-category projects section of this handbook for additional guidance.
- We have template versions of all application documents, including character limits, for you to download, draft your responses, and collaborate with your team. Find those documents on our Technical Assistance webpage.

There are eight supplemental forms available, depending on your project type. You are only required to submit the forms relevant to your project scope:

- Energy Efficiency and Renewable Energy
  - Single Unit Housing Form

        - Note: Use for existing single unit housing (e.g., single family home/duplex/triplex/quadplex energy retrofit projects OR new homes and townhomes projects that will be built to exceed the current energy code
    - Multi-unit Housing Form
    - Commercial Form
    - Renewables Form
- Regenerative Agriculture and Green Infrastructure Form
- Transportation Decarbonization Form
- Workforce and Contractor Development Form
- Other GHG-Reducing Projects Form

## 3.4 GENERAL BUDGET GUIDANCE

Before you begin drafting your budget and budget narrative, carefully review the guidance in this section. It will help you understand how to structure your funding request and avoid common issues during the review process.

We've created an Excel tool to help applicants draft their grant budget. This tool is intended for planning purposes only. Please note that all final budgets must be submitted through the WebGrants platform. Find that tool, along with Word Doc versions of all application materials on our Technical Assistance webpage.

### BUDGET FORMAT

In WebGrants, the "Personnel" category is entered differently from the other budget categories. For personnel, you'll be asked to enter individual staff positions along with specific details, rather than providing annual totals and narratives. Please see guidance below for additional information

For all other line items, WebGrants follows a two-part format:

1. Annual funding request – Enter the total dollar amount requested for each line item, broken out by project year.
2. Budget narrative – For each year, provide a description of what the funds will be used for, how you calculated the costs, and how those expenses support the proposed work.

Be sure to align your budget with your project timeline and total grant duration (see limits by grant type below). Your narrative should clearly explain how you arrived at your numbers, especially if you are using estimates.

**HELPFUL TIPS:**

- Use clear, detailed descriptions that connect budget items to project activities.
- If using estimates, explain the basis for your calculation (e.g., experience, vendor quotes, per diem rates).
- Organize your budget by project year and ensure that your costs do not exceed the allowable grant duration.
- Review each section's instructions carefully to make sure you include all required details.

## TOTAL GRANT DURATION

PCEF grants are time-limited based on project type. When designing your timeline, ensure that all project milestones and associated costs fall within the allowable grant duration. Your budget and activities should not extend beyond the specified time limit for your grant type.

- Planning Grants: Up to 2 years
- Energy Efficiency and Renewable Energy Commercial and Multi-unit Housing Projects: Up to 3 years
- Regenerative Agriculture General Operating Grants: Up to 3 years

## PERSONNEL LINE ITEM

Use this section to detail staff positions from your organization that will be directly funded by PCEF. This guidance will help you complete the personnel section accurately in your WebGrants budget form.

Include Only Direct Staff Costs

- List only employees of your organization who will be paid directly with PCEF funds for work on the proposed project.
- Do not include individuals paid as contractors—those costs should go under the "Contracted Work" section.

List Each Position Separately

- In WebGrants, enter one position per row.
- For each staff position, provide:
  - Title
  - Hourly wage (amount paid per hour)
  - Hourly fringe rate (non-wage costs such as health insurance, taxes, paid time off)
  - Estimated number of hours
- If you have not finalized specific personnel details, you may use a blended or estimated hourly rate.
- Add rows as needed to include all positions that would be paid as staff with PCEF funding.

Follow PCEF Minimum Wage Guidelines

- All personnel paid with PCEF funds must earn at least *180% of Portland's minimum wage*, which is updated annually on July 1. BOLI : Minimum wage increase schedule : For Workers : State of Oregon.
- For the period from *July 1, 2025 to June 30, 2026*, the minimum required wage is *$29.34/hour*.
- For future increases, which are unknown, assume a *3% annual increase* for budgeting purposes.
- Include any additional planned wage increases where applicable.

## TRAVEL LINE ITEM

This section describes all expenses for project-related travel, such as airfare, lodging, meals, and other costs associated with attending conferences, meetings, or site visits essential to the project. This section is not related to any expenses related to the Transportation Decarbonization funding category.

- Enter the total amount requested for this category by project year in WebGrants.
- Narrative directions: Provide a detailed summary by year that includes purpose of travel, including types of destinations, frequency of travel, and types of costs (e.g., mileage rates, airfare, or lodging). Share how you calculated these costs. If you're unsure of exact amounts, let us know what guided your estimate.
- Example response: *Travel to the annual Garden Educators Conference to improve our curriculum. Costs include airfare ($400), hotel ($450), meals ($150), and registration fees ($300), estimated based on current rates and federal per diem guidelines. The conference will help staff gain new skills and knowledge to inform the garden education program.*

## MATERIALS, EQUIPMENT, AND SUPPLIES LINE ITEM

This section describes all expenses for materials, equipment, and supplies required to implement the project. Examples may include mechanical systems, tools, meeting space rentals, educational materials, or refreshments needed for specific activities.

- Enter the total amount requested for this category by project year in WebGrants.
- Narrative directions: Provide a detailed summary by year that includes the purpose of the materials, equipment, or supplies, and how they support the project. Include quantities, cost per item, and how you calculated these costs. If you're estimating, explain what guided your estimate.
- Example response: *Costs related to home energy efficiency retrofits, including LED bulbs ($500), weather stripping ($500), and low-flow fixtures ($625), and heat pump water*

*heater replacements ($15,000). Each heat pump water heater is a 50-gallon ENERGY STAR-certified system, estimated at $3,000 per unit based on vendor quotes. These upgrades will significantly reduce energy use and lower utility costs.*

## CONTRACTED WORK LINE ITEM

This section describes services provided by external contractors to support the project. Contractors can include businesses, nonprofit organizations, or independent professionals hired to perform specific tasks or services critical to the project's success. If your organization is paying for staff time through contracted services instead of as employees of the organization, you will include those costs here.

- Enter the total amount requested for this category by project year in WebGrants.
- Narrative directions: Provide a detailed summary by year that describes the scopes of work for contracted services and how these services will support the project. Share how you arrived at the cost, whether through contractor rates, bids, or examples of similar work. If you're estimating, explain what guided your estimate.
- Example response: *We will work with an engineering firm ($10,000) to conduct fleet assessments and design charging infrastructure, and a subcontractor ($5,000) to provide technical guidance and assist with implementation. These costs are informed by competitive quotes and are essential to ensuring the successful transition to an electrified fleet.*

## OTHER LINE ITEM

This section describes all miscellaneous project-related expenses that do not fit into the other categories. Examples might include participant support costs like stipends, childcare, or transit passes, as well as unique fees or specialized resources needed for the project.

- Enter the total amount requested for this category by project year in WebGrants.
- Narrative directions: Provide a detailed summary by year that explains any costs that don't fit into other categories, including how they support the project and how you calculated their amounts. If you are estimating, explain what guided your estimate.
- Example response: *Participant support costs for a workforce training program include stipends ($22,500), calculated at $500 per month for 15 students over three months. Additional costs cover transit passes ($4,500) at $100 per month for 15 students and childcare reimbursement ($3,000) at $200 per month for five students over the same period. These estimates reflect local rates and past participation, ensuring equitable access and supporting student success.*

## SECTION 4: APPENDICES

**APPENDIX A: WORKFORCE AND CONTRACTOR EQUITY AGREEMENT**

**APPENDIX B: INSURANCE GUIDANCE FOR GRANTEES**

**APPENDIX C: GLOSSARY OF TERMS**

**APPENDIX D: SAMPLE ENERGY EFFICIENCY AND RENEWABLE ENERGY DETAILED BUDGET**

**APPENDIX E: COMMUNITY GRANTS SCORING CRITERIA**

# APPENDIX A: WORKFORCE AND CONTRACTOR EQUITY

PCEF promotes the growth of climate action-focused contractors (i.e., businesses) and workers from priority populations. PCEF grantees are required to support this effort by:

- Promoting worker safety and positive workplace culture.
- Developing a Workforce and Contractor Equity Plan that outlines strategies for recruiting and retaining qualified workers, contractors, and sub-contractors from PCEF workforce priority populations
- Adhering to Employee, Worker, Contractor, and Subcontractor Payment Guidelines
- Ensuring contractor compliance with state licensure standards.

These requirements are further explained below.

## 1. SAFE AND RESPECTFUL WORKPLACE TRAINING

The following requirements are designed to promote safe and respectful worksites. They apply to all contractors, subcontractors, and grantees performing physical improvements using a construction workforce on PCEF-funded projects.

**a. Safe and Respectful Jobsite Policy**: Provide a jobsite policy that addresses how the organization will handle issues of discrimination (such as sexism or racism) and bullying (such as harassment or intimidation), consistent with Oregon's Workplace Fairness Act. Distribute policy to all workers on PCEF funded projects and include:

i. Threatening acts of hate or violence shall be immediately reported to the appropriate authorities.

ii. Each organization shall define internal procedures for:

- *Investigation:* All incidents of hate, intimidation, or harassment shall be documented, including photos and names of witnesses where applicable.
- *Response:* Include clear chain of command, shut-down protocols, accountability, and compliance measures in addition to reporting incidents and outcomes, timeframe, and process for removal of hate crime symbols.
- *Support and protection of impacted workers and whistleblowers:* Define how leadership will report on steps taken to address the incident, how workers will be protected against retaliation, where workers can go for support, and anti-retaliation policy and training.

**b. PCEF Safe & Respectful Worksite Training:** Require all contractors, subcontractors, and workers (including apprentices) to complete a PCEF sponsored (on-demand

training) or approved respectful workplace training. This requirement applies to all workers and supervisors on PCEF funded projects, with an exemption allowed for those working less than 40 hours on the PCEF projects funded by this grant.

c. **OSHA Training**: Promote completion of OSHA-10 training for all construction workers and OSHA-30 training for all job site supervisors. Include this preference in contracts and subcontracts. For more information: OSHA Training and OSHA Training Providers
d. **Protection from Environmental Hazards**: Promote worker protection from COVID-19 exposure and climate-related events (heat, air quality, vector-borne disease). This requirement also applies to your (sub)contractors.
e. **Organizing**: Per Federal law, grant recipients, contractors, and subcontractors shall not oppose worker efforts to organize, nor shall they retaliate or otherwise create a hostile environment to workers who choose to engage in collective conversations or action regarding workplace issues (NLRB Employee Rights).

*Note:* PCEF is in the process of updating its Respectful Workplace Program to build more impactful, sustainable strategies for positive culture change. PCEF Project Managers will review any updates to Respectful Workplace training requirements with applicants prior to finalizing grant agreements.

## 2. WORKFORCE AND CONTRACTOR EQUITY PLAN

Grantees must develop and implement a plan that establishes strategies for the recruitment and retention of workers and contractors from PCEF workforce priority populations. PCEF Project Managers can provide a template to support grantees to develop a plan that meets their project needs. At a minimum, the Workforce and Contractor Equity Plan must include:

a. **Goals and strategies for recruiting and retaining PCEF workforce priority populations** in your workforce and contracting, and match what you stated in your PCEF Grant Application.
b. **Goals and strategies for recruiting, selecting, and retaining a contractor(s)** for the project. Contractors are any non-employee hired by a grantee whether they provide physical improvements or other services. Evaluation criteria for contractor selection should include goals and strong strategies for inclusive workforce recruitment and advancement on the project, as well as a history of inclusive workforce and subcontracting practices. Note that all contractors and subcontractors must adhere to PCEF payment and wage guidelines as defined in section 3.

c. **Monitoring plan** for evaluating progress at regular intervals during the life of your grant.

**Exceptions:** The following project types are *not* required to establish and implement an Inclusive Contracting and Workforce Plan:

- Projects that are not hiring contractors or workers as a part of their PCEF project.
- Projects that have already identified or hired all project contractors and workers.

## 3. VERIFY CONSTRUCTION CONTRACTOR STATE REQUIRED COMPLIANCE

For projects that include construction or other physical improvements, Grantee shall verify any State required licenses or credentials are active at the time that PCEF work is performed, including:

a. **Oregon Construction Contractor Board (CCB) License**: Verify active OR CCB license at the beginning of each project at: CCB Contractor Search.
b. **CCB Lead Renovators License for work on all 1978 or older homes or buildings:** Verify current Certified Lead-Based Paint Renovation Contractor (LBPR) License at the beginning of each project at: CCB Lead License Search
c. **Oregon Bureau of Labor and Industry (BOLI) Agent Registration:** If apprentices are being used, ensure registration as a BOLI registered training agent. Check BOLI Registered Agents and BOLI Ineligible Contractors

## 4. ADHERE TO EMPLOYEE, WORKER, CONTRACTOR, AND SUBCONTRACTOR PAYMENT GUIDELINES

These payment requirements apply to all staff, employees, contractors, subcontractors, and workers who perform any work on PCEF-funded projects. "Contractors" are any non-employee hired by a grantee whether they provide physical improvements or other services.

a. **Meet PCEF wage requirements:**
   i. *PCEF Family Wage Requirement:* All employees and workers of grantee and grantee's contractors and subcontractors shall be paid **at least 180% of** relevant state minimum wage for time worked on the PCEF funded project.
   ii. *Prevailing Wage Requirement:* All PCEF-funded construction projects that are $350,000 or greater at a single site, shall adhere to State Prevailing Wage requirements. Payment of prevailing wage shall include fringe and be made to workers in trades for which a prevailing wage is defined.

*Note* that prevailing wage requirements are excluded on some, but not all, affordable housing projects. The exclusion applies to projects that are privately owned, predominantly affordable residential housing construction. "Affordable housing" means at least 60 percent of the project is designated for residents with incomes no greater than 60 percent of the area median income. "Residential" means no more than four stories in height and no commercial space. ORS 279C,810(2)(d); OAR 839-025-0100(1)e.

**b. Commit to payment terms and record keeping:**

i. *Pay contractors within 30 days* of billing AND ensure that contractors agree to pay subcontractors within 30 days of billing.

ii. *Retain your contractor payment records for 6 years* beyond the end of the grant period AND require the same of your (sub)contractors.

iii. *Retain your workforce payment records for 6 years* beyond the end of the grant period AND require the same of (sub)contractors.

*iv.* *Participate in verification audit* if selected.

## 5. SUBMIT QUARTERLY WORKFORCE REPORTING

Information on all workers, contractors and subcontractors on PCEF projects shall be entered into PCEF furnished template four times per year along with other project reporting. Information reported for each worker includes job title, hours worked, hourly wage earned, benefits received, and demographics. It is important that contractors understand these reporting requirements before work begins.

# APPENDIX B: INSURANCE GUIDANCE FOR GRANTEES

**City of Portland Basic Insurance Requirements:**

- The insurance requirements will be listed in your grant agreement under section 5.13.d.
- Insurance requirements typically include:
    - **Commercial general liability**, $2,000,000 per occurrence
    - **Additional insured endorsement**, naming City of Portland
    - **Workers' compensation insurance**, $500,000 each accident, $500,000 disease each employee, and $500,000 disease policy limit
    - *If working with minors, elderly, or other vulnerable populations* – **Physical abuse and sexual molestation liability**, $1,000,000 per occurrence and $3,000,000 aggregate.
    - *If using an automobile to transport goods or people as part of grant-funded activities* – **Automobile liability insurance**, $2,000,000 for each accident.

**General tips:**

- **Certificate format:** We can accept digital copies of insurance documents. The City Attorney's Office only accepts certificates of insurance and does not accept lengthier policy description documents.
- **Certificate holder:** The insurance certificates need to list "City of Portland" as the certificate holder. If your insurance provider asks for a physical address, you can give "1810 SW 5th Ave., Suite 710 Portland, OR 97201".
- **Delivery method:** We can accept certificates either from the grantee or from the insurance provider. If PCEF staff identify an error on a certificate, we may contact your insurance provider directly.
- **Workers' compensation proof of insurance:**
    - If your organization has no paid staff, then you are not required to carry worker's compensation insurance. In that case, you will need complete the worker's compensation exemption form. Your grant manager will email you this document.
- **Meeting coverage requirements:** If your organization does not carry insurance coverage limits that meet the City's requirements, you have two options, listed below. For either option, your project manager will need to approve the decision.
    1. Increase your insurance limits. The cost of the additional insurance coverage can be paid with grant funding.
    2. City chooses to waive or reduce your insurance requirements. We rarely use this option and approval will depend on specific circumstances.

# APPENDIX C: GLOSSARY OF TERMS

**Active funds:** This is the amount awarded by city ordinance and includes only programs where grant agreements are executed and where work has begun.

**Active Transportation and Transit**: Generally, forms of transportation that are non-single occupancy car. This includes walk, rolling, bike, e-bike, scooter, e-scooter, public transit, etc.

**Allocated funds:** This is the amount awarded by city ordinance and includes all previous rounds of Community Grant funding and funding approved through the Climate Investment Plan.

**Apprentice:** Individual enrolled in an Oregon Bureau of Labor and Industries (BOLI) certified apprenticeship program.

**Apprenticeable trade:** Job classifications that have a designated registered apprenticeship program. Registered apprenticeships are structured, well-defined, meet industry standards, and are approved by the State of Oregon.

**BOLI (Oregon Bureau of Labor and Industries):** Oregon State agency that oversees apprenticeship and pre-apprenticeship programming in the state and has enforcement responsibility for state laws prohibiting discrimination in employment, housing, public accommodation, and vocational, professional and trade schools.

**Beneficiaries:** In the context of PCEF, beneficiaries are the people, communities or entities that are intended to receive the positive impacts of a PCEF project or program, but who are not directly employed by the grant project (e.g., residents whose homes are weatherized).

**Bioswales:** Gardens with perennial (or long-lasting) plants that are planted in a way that guides stormwater in. The bioswale or garden will have plants with deep roots that allow stormwater to infiltrate into the ground, which reduces the amount that flows across the ground and helps urban flooding and treats stormwater. They are also known as infiltration swales, biofilters, grassed swales, or in-line bioretention.

**Carbon dioxide equivalent (CO2e):** A unit of measure that provides a standardized way to compare different types of greenhouse gas emissions or air pollutants based on their potential to contribute to climate change. The calculation is made by converting other types of gases into the amount of carbon dioxide that would have the same potential to trap heat and contribute to global warming.

**Carbon sequestration:** Removing carbon dioxide from the atmosphere through capture or long-term storage.

**Career discovery:** A process of learning about career opportunities and considering their fit with personal characteristics, preferences, interests, skills, and talents.

**Clean energy:** Clean energy projects reduce carbon emissions through energy efficiency, energy conservation or renewable energy generation:

- Energy efficiency: Using, implementing, or installing measures and equipment that require less energy to perform the same task. For example, a heating or cooling system which provides the same level of comfort but with less energy would be considered energy efficient. PCEF encourages applicants to propose the use of the most energy efficient measures and equipment currently available and appropriate for each site. Energy conservation are behaviors and actions that reduce energy consumption, e.g. turning off the lights or lowering a thermostat. Programs that create energy conservation are also eligible activities in PCEF projects.
- Renewable energy: A renewable energy measure generates energy that is collected from sources which are naturally replenished including sunlight, wind, water, and geothermal heat. Common measures include solar electric or photovoltaic (PV) systems, solar thermal, including solar hot water (domestic water heating and space heating), and solar ventilation air preheating, geothermal heat pump or wind turbines.

**Climate action:** Activity which: 1) mitigates climate change by reducing or sequestering greenhouse gas emissions; 2) diversifies and expands the pool of contractors and workers that produce goods or services that reduce or sequester greenhouse gas emissions.

**Climate investment:** Climate investment refers to any resource dedicated to climate action, e.g., PCEF grant funds, Energy Trust of Oregon incentives, market lending, etc.

**Climate Investment Plan (CIP):** PCEF's five-year funding roadmap, including annual Community Grants cycles and Strategic Programs implemented by partners at the City and in community.

**Climate resiliency:** The ability to withstand stresses and continue to function in the face of hazards created by climate change. For example, the cooling effect of shade from overhead trees can improve a community or household's resiliency to extreme heat events.

**Co-benefits**: Multiple or secondary benefits associated with a project. For example, planting trees and maintaining their health so they to suck up carbon dioxide from the air and store it may have co-benefits of cooling through shade, etc. The type of co-benefit may be economic, social and/or environmental.

**COBID certification:** Businesses can receive COBID certification through The State of Oregon's Certification Office for Business Inclusion and Diversity for being an Emerging Small

Business (ESB), Minority/ Women Business Enterprise (M/WBE), and Service-Disabled Veteran Enterprise (SDV).

**Community benefit agreement:** A contract detailing the distribution of benefits associated with a project. Agreements may focus specifically on labor and contracting or may include a broader set of social and environmental impacts.

**Community solar:** Solar electricity generated from a central location and shared by multiple subscribers. Subscribers receive a credit on their electricity bill, reducing the amount they pay each month.

**DBA or "Doing Business As":** A business or non-profit organization operating under a name that is different than the legal name with which the entity is registered.

**Demographics:** Information about the characteristics of a population or group.

**Person with a disability:** Individuals with a physical, mental, cognitive, or developmental condition that impairs, interferes with, or limits a person's ability to engage in certain task(s).

**Displacement:** When an individual or business moves from their existing location. Displacement can result from rent or tax increases, a reduction in the amount of affordable housing available in a neighborhood, or changes in the neighborhood that remove the economic and social support that residents and business rely on.

**Direct GHG emissions reductions**: Greenhouse gas emissions savings that result from reduced fossil fuel energy use (e.g., energy efficiency) or sequestration of carbon (e.g. planting trees).

**Diverse contractor:** For PCEF grant applications, diverse contractors are either:

- Certified by the State of Oregon's Certification Office for Business and Inclusion (COBID) as a Minority-Owned Business Enterprise, Women-Owned Business Enterprise, Emerging Small Business, or Service-Disabled Veteran Business (M/W/DBE/ESB/SDV) (provide certification #); OR
- A non-profit or non-COBID certified business that is Defined as follows:
    - Registered with the Oregon Secretary of State
    - Gross annual receipts (3-year average) do not exceed $23.98 million
    - Control and management of day-to-day operations is led by persons from the defined population
    - For non-profit organizations, demographics of the Board of Directors and executive staff are 51% or greater of the defined populations.

- For Businesses – ownership of 51% or greater is held by persons from the defined populations, and owner is not an owner or partial owner of other construction/ construction-related firms.

**Diversity:** The range of human differences that make people unique including race, ethnicity, nationality, gender identity, sexual orientation, religion, age, socio-economic status, and physical and mental ability.

**Economically disadvantaged:** People who belong to a group that have limited capital and credit opportunities because of social disadvantages resulting from oppressive or discriminatory systems.

**Energy efficiency:** Energy efficiency is doing the same task or delivering the same service (e.g., light, heat, cooling, refrigeration, etc.) with less energy. Examples including using efficient technologies in space conditioning (heating and cooling), water heating and lighting, or improvements to the building envelope, which is defined as the structural barrier between the interior and exterior of a building – it plays a large role in controlling the climate within the interior of a building

**Energy storage:** The capture of energy produced at one time for use later such as a battery.

**Equity:** Equity is when everyone has access to the opportunities necessary to satisfy their essential needs, advance their well-being and achieve their full potential.

**Estimated annual generation:** The amount of energy that will be produced over the course of a year.

**Expensed / Paid out:** The portion of awarded funding paid through invoices or advances to implement projects.

**Family wage standards:** Is "no less protective of workers than those contained in the State of Oregon's Energy Efficiency and Sustainable Technology Act, ORS 470.560(2)(g)" which establishes a rate of 180% of minimum wage.

**Fiscal sponsor:** A qualified non-profit organization that is providing organizational infrastructure and administrative support for managing a grant to an organization or informal group/individual that is the primary party implementing the grant. Fiscal sponsors typically provide financial management, access to insurance, and/or technical assistance.

**Fleet Electrification and Charging Deployment** - Projects that focus on converting the existing fleet into electric, installing EV charging stations, and programs that increase awareness and activate community members/entities electrification journey.

**FTE or "Full Time Equivalent":** FTE is the number of hours compensated or worked divided by the number of hours a full-time worker would work during the project time period (see

equation below). FTE is not a count of the number of people, if two staff are each working 20 hours per week they would count as one FTE.

*Number of hours compensated or worked / 40 × project duration in number of weeks*

**Fringe:** Benefits or value received by a worker that are outside of their pay. For example, health benefits, use of company car, retirement account contributions, etc.

**General contractor:** Also called a prime contractor, this is the person or business responsible providing materials, labor, equipment, and oversite of a construction (including renovation) or improvement project under contract.

**Greenhouse gas emissions:** Gasses in the earth's atmosphere that trap heat. Greenhouse gasses contribute to global climate change.

**Greenhouse gas sequestration:** The capture and long-term storage of carbon, a primary greenhouse gas that traps heat in the Earth's atmosphere. Examples of sequestration projects include planting trees and agricultural practices that increase the capacity of the soil to store carbon.

**Green infrastructure:** Use of vegetation, soils, and other elements and practices to restore some of the natural processes required to reduce greenhouse gasses; a network of ecological solutions for urban climactic and social challenges, such as "heat island effect", flooding, habitat fragmentation, air quality, etc. Common approaches include stormwater management, increasing biodiversity, tree planting, improving air quality, and anything that increases urban carbon sequestration.

**Historically disadvantaged:** Groups of people who have faced systemic and institutional discrimination and barriers.

**Innovation/other:** A PCEF funding category for projects that describes those that do not directly fall under one of the other categories but provide an opportunity to meet climate goals and promote economic, social, and environmental benefits. Transportation projects are included in this funding area.

**Installed capacity:** The maximum output of electricity that a generator can produce under ideal conditions (sometimes called the nameplate generating capacity).

**Job hours:** The number of hours spent on a particular job. The PCEF application asks for estimated job hours for certain activities; this should be the total number of hours that will be spent (worked) by all workers on those specific activities.

**Journey level:** Individuals who have successfully completed an apprenticeship program and can demonstrate a high level of competency in an occupation. They receive a journey card and nationally recognized certificate.

**kWh or kilowatt-hours:** A measure of electric energy.

**Leverage:** Additional resources, cash or in-kind, that help pay for total project costs. Leverage in grants is also commonly known as match.

**Local or locally based business:** A business located within 30 miles of Portland City Hall.

**Low income:** Defined for PCEF as individuals, or households with a gross household income at or below 80 percent of Area Median Income.

**Major redevelopment:** For the purposes of PCEF programs that invest in regulated affordable multi-unit housing, major redevelopment means that the work being done to the housing in question is significant enough to require refinancing.

**Memorandum of Understanding (MOU):** A formal agreement between a grant applicant and a relevant partner proposing to work together on a project.

**Neighborhood:** Neighborhoods may be defined using official or functional boundaries. The City has 94 neighborhood associations and seven district coalitions, though residents may have their own sense of neighborhood based on patterns of interaction and identity.

**Net Zero:** For the purposes of PCEF, net zero means that projects install solar that generates at least as much electricity as the building uses each year. Net zero buildings have ultra-low electric bills, typically only paying for utility service fees.

**Overhead:** Refers to general costs of operations such as rent, utilities, administrative staff, insurance, legal, website and telecommunications.

**People of color:** Refers to people that do not identify as White.

**Physical improvement:** Project or project activity which includes construction activities and/or physical installation. Weatherization, solar panel installation, tree planting and regenerative agriculture planting are all examples of physical improvements.

**Prevailing wages:** Industry-specific wage and fringe benefit standards required by law for public works projects. For privately-owned construction projects receiving greater than $750,000 of total public funds, prevailing wage standards generally apply as defined in Oregon Statute (ORS 279C.800(6)(a) and OAR 839-025-0004(20)(a)). Residential affordable housing is generally exempt from the prevailing wage law. Oregon's prevailing wage rate (PWR) law is administered by the Bureau of Labor and Industries (BOLI).

**Prime Contractor:** Also called a General Contractor, is the person or business that has the main responsibility for managing and overseeing a construction, renovation, or improvement project under contract and who often has portions of the work completed by subcontractors.

**Priority population**: PCEF Priority Population means groups that are under-resourced by sustainability, climate action, and clean energy programs, and therefore are centered in PCEF's investments to ensure equitable climate action. These may include, but are not limited to, people with low incomes, people with disabilities, and people of color. Priority populations often have less access to the benefits of environmental investments while facing greater vulnerability to climate-related harms such as extreme heat, wildfire smoke, vector-borne diseases, and flooding.

**Qualified non-profit organization:** Organizations that are eligible to apply for and receive PCEF grant funds, by meeting all of the following requirements:

- Organization is designated at the Federal level as a 501(c) or 521(a) non-profit entity
- Organization is registered and certified with the Oregon Secretary of State as a non-profit organization.
- Organization is NOT on the Oregon Department of Justice list of Disqualified Charities.

**Regulated affordable housing:** Single or multi-family rental housing with requirements to maintain affordability to low-income occupants for no less than 30 years. Affordable means that occupants pay no more than 30 percent of their gross income for rent and utilities.

**Regenerative agriculture:** An ecological and sustainable approach to local food production and farming systems. Focused on sequestering carbon, increasing biodiversity, pollinator habitat, improving water cycle, increasing resilience to climate change, strengthening the health of urban soils, and improving access to locally sourced produce. Common methods: First foods cultivation, traditional ecological knowledge practices, permaculture, community gardening that results in reduction of reliance on commercial food production systems.

**Registered training agent:** An employer who is registered to provide apprentice training opportunities and has committed to provide on-the-job training and supervision according to approved industry standards. Evaluates progress and makes recommendations to the apprenticeship committee regarding an individual's advancement in the program. Also called a training agent.

**Renewable energy:** Energy that is not produced from fossil fuels or nuclear power and which is produced from sun, wind, water, or other renewable sources identified by the City. In-river hydro projects that harm or have the potential to harm salmonids or other aquatic species, or

Native American or other communities that rely on such species are not considered renewable energy.

**Self-perform:** When a grantee (applicant) conducts work on a project rather than contracting it out- particularly in the context of construction or other physical improvements or installations.

**Social benefits:** Benefits that go to people, individually or as a group. Examples include savings from reduced utility bills and improved health outcomes from cleaner air.

**Social justice:** The pursuit of fair and equitable treatment, opportunities, and outcomes for all people by addressing the root causes of social, economic, and environmental inequities. Social justice emphasizes the importance of including those most impacted by systemic barriers as leaders and decision-makers in shaping solutions.

**U.S. made:** PCEF renewable energy technology is required to be U.S. made unless unavailable or cost prohibitive. Manufactured in the U.S. Components of subcomponents may be produced anywhere as long as the manufacturing occurs in the United States. A product is considered **unavailable** if the relevant manufactured goods are not produced in the US in sufficient and reasonably available quantities and of a satisfactory quality. A product is considered **cost prohibitive** if the use of domestically produced manufactured goods would increase the overall project cost by more than 25 percent.

**Useful life:** An estimate of the time period that an item will be functioning or operational (e.g., a solar panel, a building). For example, a solar panel might have a 30-year useful life, meaning that benefits (environmental and financial) should be considered for that time period.

**Utilization:** Percent of work hours that is projected to go to a particular population group for workers or apprentices on a project (e.g., 15% utilization of women for trades on a project) or percent of contract value that is projected to go to diverse contractors (e.g., 30% of total contract value will go to minority owned contractors and subcontractors).

**Weatherization:** Measures that protect a building and its interior from the elements, particularly from sunlight, precipitation, cold, heat and wind, and modify a building to reduce energy consumption and optimize energy efficiency. Typical weatherization measures include insulation, air sealing, high efficiency appliances and duct sealing for existing homes.

**Workforce and Contractor Equity Plan:** Asked of all grant recipients, grantees identify actions and goals related to promoting workforce and contractor equity on their PCEF projects.

**Workforce development**

- Workforce development: Workforce development improves worker skills to enable long-term success creating, sustaining, and retaining viable employment. It focuses not only on what the employee needs to know now, but how they can grow, develop and advance in their career over time. The objective of workforce development is to create economic prosperity for individuals, businesses, and communities. PCEF workforce development programs should prepare workers to participate in the green economy.
- Contractor support: Contractor support includes but is not limited to access to trainings/seminars, technical assistance, capital & equipment and mentorship that will help new and existing entrepreneurs to be successful.

**Workforce priority populations:** Means groups that are under-resourced by sustainability, climate action, and clean energy programs, and therefore are centered in PCEF's investments to ensure equitable climate action. These may include, but are not limited to, people with low incomes, people of color, and people with disabilities. Priority populations often have less access to the benefits of environmental investments while facing greater vulnerability to climate-related harms such as extreme heat, wildfire smoke, vector-borne diseases, and flooding.

# APPENDIX D: SAMPLE ENERGY EFFICIENCY AND RENEWABLE ENERGY DETAILED BUDGET

The following example relates to budgets that are part of the Energy Efficiency and Renewable Energy funding category. To read more about that category, visit this section of the handbook.

| CATEGORY & ITEMS | Include the following as relevant to clean energy improvements. | LABOR (Prevailing or PCEF Min WAGE) | MATERIALS | CONTRACTOR PRICE | CONTINGENCY | TOTAL |
|---|---|---|---|---|---|---|
| **PLANNING** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| Engineering | Engineering, plans & specs, review & surveys. | | | $0.00 | $0.00 | $0.00 |
| Permit | Building, environmental, zoning | | | $0.00 | $0.00 | $0.00 |
| **UTILITIES** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Electrical - Connection (Solar) | | | $0.00 | | |
| | Electrical - Permit | | | $0.00 | | |
| | Gas - Shuttoff/Decommission | | | $0.00 | | |
| | Oil Tank Removal | | | $0.00 | | |
| **WINDOWS** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Windows | | | $0.00 | | |
| | Window cavity air sealing | | | | | |
| | Window cavity dry rot repair | | | | | |
| **INSULATION + AIR SEALING** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Air Sealing | | | $0.00 | | |
| | Insulation Removal | | | $0.00 | | |
| | Insulation - Basement Interior | | | $0.00 | | |
| | Insulation - Crawlspace | | | $0.00 | | |
| | Insulation - Roof / Attic | | | $0.00 | | |
| | Insulation - exterior | | | $0.00 | | |
| | Insulation - Wall Cavity | | | $0.00 | | |
| | Asbestos remediation | | | $0.00 | | |
| | Radon testing or mitigation system | | | $0.00 | | |

| CATEGORY & ITEMS | Include the following as relevant to clean energy improvements. | LABOR (Prevailing or PCEF Minimum WAGE) | MATERIALS | CONTRACTOR PRICE | CONTINGENCY | TOTAL |
|---|---|---|---|---|---|---|
| **PLUMBING AND WATER HEATING** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Condensate Drain | | | $0.00 | | |
| | Venting or ductwork | | | $0.00 | | |
| | Water Heater | | | $0.00 | | |
| | Showerhead (low-flow) | | | $0.00 | | |
| | Faucets (low-flow) | | | $0.00 | | |
| | Disposal of old tanks | | | $0.00 | | |
| **ELECTRICAL** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Service Panels or Sub-Panel upgrades | | | $0.00 | | |
| | Rough Wiring | | | $0.00 | | |
| | LED Lighting Fixtures | | | $0.00 | | |
| | Low-Voltage Transformers | | | $0.00 | | |
| | Lighting Control System | | | $0.00 | | |
| | Knob and tube wiring decomissioning | | | $0.00 | | |
| | Smoke + CO2 Alarms | | | $0.00 | | |
| **HVAC** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Air handler / furnace / baseboard or cadets decommission, removal and disposal | | | $0.00 | | |
| | Duct Inspection, sealing and repair | | | $0.00 | | |
| | Ducted Heat Pumps | | | $0.00 | | |
| | Ductless Heat Pumps | | | $0.00 | | |
| | Proprietary Thermostat or Smart Thermostat | | | $0.00 | | |
| | Whole-House Ventilation | | | $0.00 | | |
| | Bath fans | | | | | |
| | ERV or HRV system | | | $0.00 | | |
| **DRYWALL + PLASTER** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Repair walls, ceilings, soffits due to air sealing, insulation, or heat pump upgrades | | | $0.00 | | |

| CATEGORY & ITEMS | Include the following as relevant to clean energy improvements. | LABOR (Prevailing or PCEF Minimum WAGE) | MATERIALS | CONTRACTOR PRICE | CONTINGENCY | TOTAL |
|---|---|---|---|---|---|---|
| **APPLIANCES** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | Energy Star fridge/dishwasher/washer/ dryer/induction cooktop | | | $0.00 | | |
| | Energy Star fridge/dishwasher/washer/ dryer/induction cooktop | | | | | |
| | Energy Star fridge/dishwasher/washer/ dryer/induction cooktop | | | | | |
| **SOLAR INSTALLATION** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | PV and Inverter | | | $0.00 | | |
| | Battery System | | | $0.00 | | |
| **EV CHARGERS** | | **$0.00** | **$0.00** | **$0.00** | **$0.00** | **$0.00** |
| **Description of Work:** | EV Chargers | | | $0.00 | | |
| **TOTALS** | | **$0.00** | **$0.00** | **$0.00** | | **$0.00** |

# APPENDIX E: COMMUNITY GRANTS SCORING CRITERIA

## IMPLEMENTATION GRANT SCORING CRITERIA

There are six sections to the implementation scoring guidance tables.

- **Organization and Project Team** – these criteria are worth 30 points total and apply to all project types regardless of funding area.
- **Overall Project Description and Plan** - these criteria are worth 25 points total and apply to all project types regardless of funding area.
- **Project Benefit for Clean Energy, Regenerative Agriculture, Green Infrastructure, Transportation Decarbonization, and Other projects** – these criteria are worth 30 points and apply to all projects with elements from one of the listed funding areas. These criteria do not apply to applications that are purely for Workforce and Contractor Development.
- **Project Benefit for Workforce and Contractor Development projects** – these criteria are worth 30 points and apply to all projects with Workforce and Contractor Development elements. These criteria do not apply to applications that are purely for Clean Energy, Regenerative Agriculture, Green Infrastructure, Transportation Decarbonization, and/or Other projects.
- **Workforce Benefits** - these criteria are worth 5 points total and apply to all project types regardless of funding area.
- **Budget** - these criteria are worth 10 points total and apply to all project types regardless of funding area.

Please note that projects that include elements of both workforce and contractor development and one or more of the other funding areas (e.g., clean energy, transportation decarbonization, etc.) will be scored on all applicable criteria with final score weighted based on amount of budget allocated to each funding area.

**Note on GHG Reduction Scoring**

- Applicants are not expected to calculate their own GHG reduction estimates. Instead, PCEF staff apply a consistent formula across all applications using the data provided in the supplemental forms to generate a GHG score.
- While eight points are explicitly allocated to GHG emissions reduction and sequestration in the scoring criteria, it's important to understand that GHG impact is embedded throughout several other scoring areas.

| *ORGANIZATION AND PROJECT TEAM – (30)*<br>*Applies to all implementation applications.* | |
|---|---|
| *Criterion* | *Points* |
| Organization has a track record of delivering programs that benefit PCEF priority populations. Organization is well positioned to deliver benefits to PCEF priority populations. | 10 |
| Project team, including non-profit staff, contractors, and other partners, have demonstrated experience that will support project success. | 10 |
| Application demonstrates strong understanding and practice around community organizing, outreach, and/or stakeholder engagement, particularly focused on one or multiple PCEF priority populations. | 10 |

| *OVERALL PROJECT DESCRIPTION AND PLAN (25)*<br>*Applies to all implementation applications.* | |
|---|---|
| *Criterion* | *Points* |
| Project description is complete and intended outcomes are clear. Services, activities, and timeline described in scope will result in intended outcomes. | 10 |
| Project will benefit PCEF priority populations. | 7 |
| Alignment with PCEF guiding principles.<br>• Focused on climate action with multiple benefits<br>• Community powered<br>• Justice Driven<br>• Accountable | 8 |

*PROJECT BENEFIT (CE, RAGI, TD, OTHER) (30)*

*This table applies to applications with project elements in these categories: Clean Energy, Regenerative Agriculture and Green Infrastructure, Transportation Decarbonization, Other. This section does not apply to applications that are entirely focused on Workforce and Contractor Development programming. If the project elements include Workforce and Contractor*

| *Development and additional funding categories, the application will be scored on all applicable criteria with final score weighted based on amount of budget allocated to each funding area.* | |
|---|---|
| *Criterion* | *Points* |
| GHG emissions reduction (including sequestration) cost effectiveness and/or impact | 8 |
| Appropriate plan to maintain project GHG emissions reduction for its full useful life (beyond the life of grant). | 2 |
| Project provides meaningful additional non-GHG environmental benefits as a result of project activities listed below:<br>• Planting and establishing trees for shade/reduce heat islands; excluding planting of street/public right-of-way trees.<br>• Improving natural areas that support biodiversity, maintain ecological processes, and sustain air and water resources.<br>• Removing pavement, replacing with permeable material/plants.<br>• Conserving or otherwise managing water.<br>• Improving air quality through mode switching from gas/diesel to electric vehicles or active transportation. | 4 |
| Project reduces cost for members of PCEF priority populations through savings in electricity, natural gas or other fuel used for space heating, transportation fuel, and/or food expense. | 8 |
| Project provides health benefits as a result of project activities listed below.<br>• Removing gas and oil from a building<br>• Improving building ventilation<br>• Improving building filtration<br>• Adding cooling to a building<br>• Promoting active transportation<br>• Providing access to healthy local food<br>• Making a direct connection to health and healing through farming or other horticultural therapy practices | 5 |
| Project improves resiliency through project activities listed below.<br>• Improving indoor air quality through building filtration<br>• Adding cooling to a building<br>• Adding storage for a renewable energy source, e.g., solar + storage<br>• Planting and establishing trees for shade/reduce heat islands | 3 |

| *PROJECT BENEFIT (WCD) (30)*<br>*This table only applies to applications with project scope elements related to Workforce and Contractor Development. This section does not apply to applications that are entirely focused on the other funding areas. If the project elements include Workforce and Contractor Development and additional funding categories, the application will be scored on all applicable criteria with final score weighted based on amount of budget allocated to each funding area.* | |
|---|---|
| *Criterion* | *Points* |
| Program will support PCEF goals of:<br>• Diversifying **workforce** in the green economy through appropriate training, job placement and support.<br>• Diverse **contractor** start-up, stabilization, growth, pivot in businesses focused on climate related goods and services.<br>• **Education/exposure:** improved youth knowledge of, and readiness for, careers in climate work. | *15* |
| Project outreach, engagement and retention strategies are informed by deep understanding of culture, opportunities, and barriers of the PCEF priority population the project is intended to serve. | *10* |
| Project provides other social benefit(s) not already included in other criteria. | *5* |

| *WORKFORCE BENEFIT (5) Applies to all implementation applications.* | |
|---|---|
| *Criterion* | *Points* |
| Hiring and recruitment practices will support PCEF workforce and contracting goals. | 5 |

| *BUDGET AND LEVERAGE (10) Applies to all implementation applications.* | |
|---|---|
| *Criterion* | *Points* |
| Project budget is complete and reasonable for the project proposed. | 7 |
| Project leverages resources, such as other funding sources or in-kind services. | 3 |

## PLANNING GRANT SCORING CRITERIA

There are three sections to the planning scoring guidance tables. All criteria apply to all planning applications, regardless of funding area.

1. Organization and Project Team – these criteria are worth 40 points total.
2. Overall Project Description and Plan - these criteria are worth 50 points total.
3. Budget – these criteria are worth 10 points total.

| *OVERALL PROJECT DESCRIPTION AND PLAN (50) - Applies to all planning applications.* | |
|---|---|
| *Criterion* | *Points* |
| Alignment with PCEF guiding principles.<br>• Focused on climate action with multiple benefits<br>• Community powered<br>• Justice Driven<br>• Accountable | 10 |
| The opportunity statement demonstrates understanding of issue and addresses social, economic, and climate justice. | 15 |
| Scope of planning process is clear, manageable, and likely to succeed. | 15 |
| Percent of benefits for project(s) that will be developed as a result of the planning process that will go to specific PCEF priority populations. | 10 |

| *ORGANIZATION AND PROJECT TEAM (40) - Applies to all planning applications.* | |
|---|---|
| *Criterion* | *Points* |
| Organization has a track record of delivering programs that benefit PCEF priority populations. Organization is well positioned to deliver benefits to PCEF priority populations. | 10 |
| Project team, including non-profit staff, contractors, and other partners, have demonstrated experience that will support project success. | 10 |
| Application demonstrates strong understanding and practice around community organizing, outreach, and/or stakeholder engagement, particularly focused on one or multiple PCEF priority populations. | 10 |
| Applicant is a small or emerging organization. | 10 |

| *BUDGET (10) - Applies to all planning applications.* | |
|---|---|
| *Criterion* | *Points* |
| Project budget is complete and reasonable for the project proposed. | 10 |