

# Welcome!

## Thank you for being here.

- While you wait, please enter your name, organizational affiliation, and a recent book or podcast you recommend in the chatbox
- All lines will be muted unless speaking
- If you have a question / comment, use the chatbox; we will pause periodically to answer clarifying questions and hold other questions for the Q&A at the end
- We will begin shortly, thank you for joining the **September 2020 RFP Informational Webinar #1!**



Bureau of Planning and Sustainability

VISIT US ONLINE  
[portland.gov/bps/cleanenergy](http://portland.gov/bps/cleanenergy)

COMMUNITY IS KEY



# September 2020 RFP Informational Webinar #1

Sept. 25, 2020, 12-1:30p.m.

PORTLAND  
CLEAN ENERGY  
COMMUNITY BENEFITS  
FUND



Bureau of Planning and Sustainability

VISIT US ONLINE  
[portland.gov/bps/cleanenergy](https://portland.gov/bps/cleanenergy)

# Virtual Participation Check

## Guidelines applied to virtual meeting:



**Chatbox:** for introductions and questions, chatbox will be open during entire meeting.



**Raise Hand:** use the raised hand at any time if you have a question.



**Recording:** this meeting is being recorded.



**Captioning:** this meeting is being captioned; settings > show subtitles.

If we don't get to your question, we will provide you an answer directly and post to the website if the answer can't be found in our grant materials.

# Welcome!

Thank you for being here.

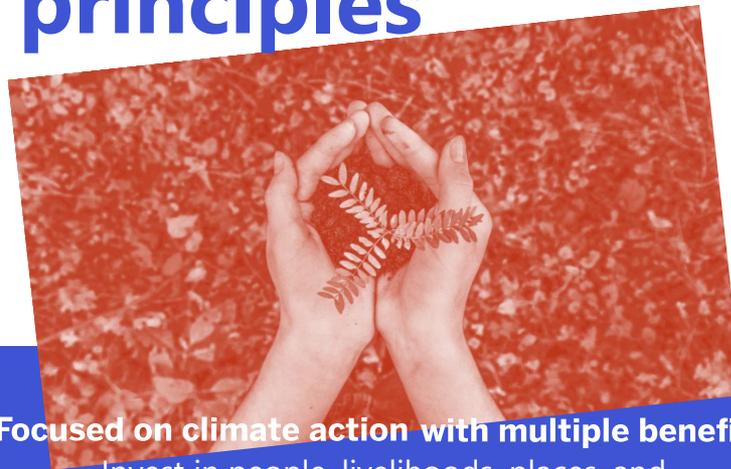
We will pause periodically to answer any clarifying questions that are put into the chat and hold other questions for the Q&A at the end of the webinar.

## Chatbox introductions

1. Name, organizational affiliation, and a book or podcast you recommend
2. Poll: which of these most applies
  - I have read the RFP material and have specific questions
  - I have read some of the RFP material, here to learn
  - I have not read the RFP material, here to learn



# Guiding principles



**Focused on climate action with multiple benefits.**

Invest in people, livelihoods, places, and processes that build climate resilience and community wealth, foster healthy communities, and support regenerative systems. Avoid and mitigate displacement, especially resulting from gentrification pressures.



## Justice Driven

ADVANCE systems change that addresses historic and current discrimination.

CENTER all disadvantaged and marginalized groups – particularly Black and Indigenous people

TRUST community knowledge, experience, innovation, and leadership.

HONOR AND BUILD ON existing work and partnerships, while supporting capacity building for emerging community groups and diverse coalitions.

ENGAGE WITH AND INVEST IN community-driven approaches that foster community power to create meaningful change.



## Accountable

IMPLEMENT transparent funding, oversight, and engagement processes that promote continuous learning, programmatic checks and balances, and improvement.

DEMONSTRATE achievement of equitable social, economic, and environmental benefit.

REMAIN accountable to target beneficiaries, grantees, and all Portlanders.



## Community-powered

# What kinds of projects can be funded?

Year 1: \$8.6 million

Year 2+: \$40-60 million annually



Innovation

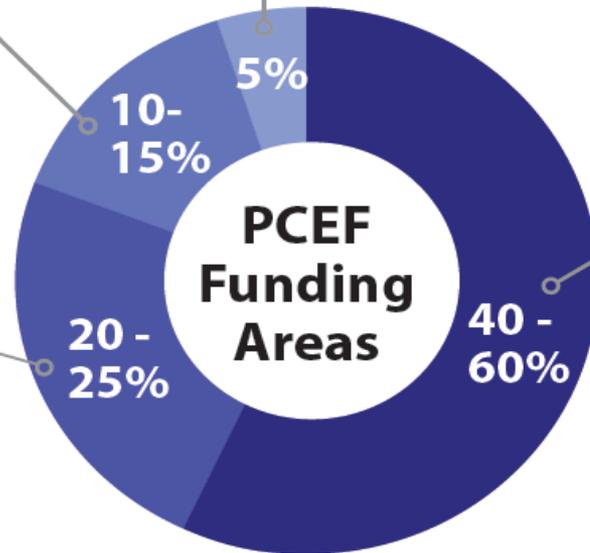
Green Infrastructure and Regenerative Agriculture



Contractor Training & Support  
Workforce Development



Clean Energy Programs



# Who is eligible to apply?

Organizations can apply if they are:

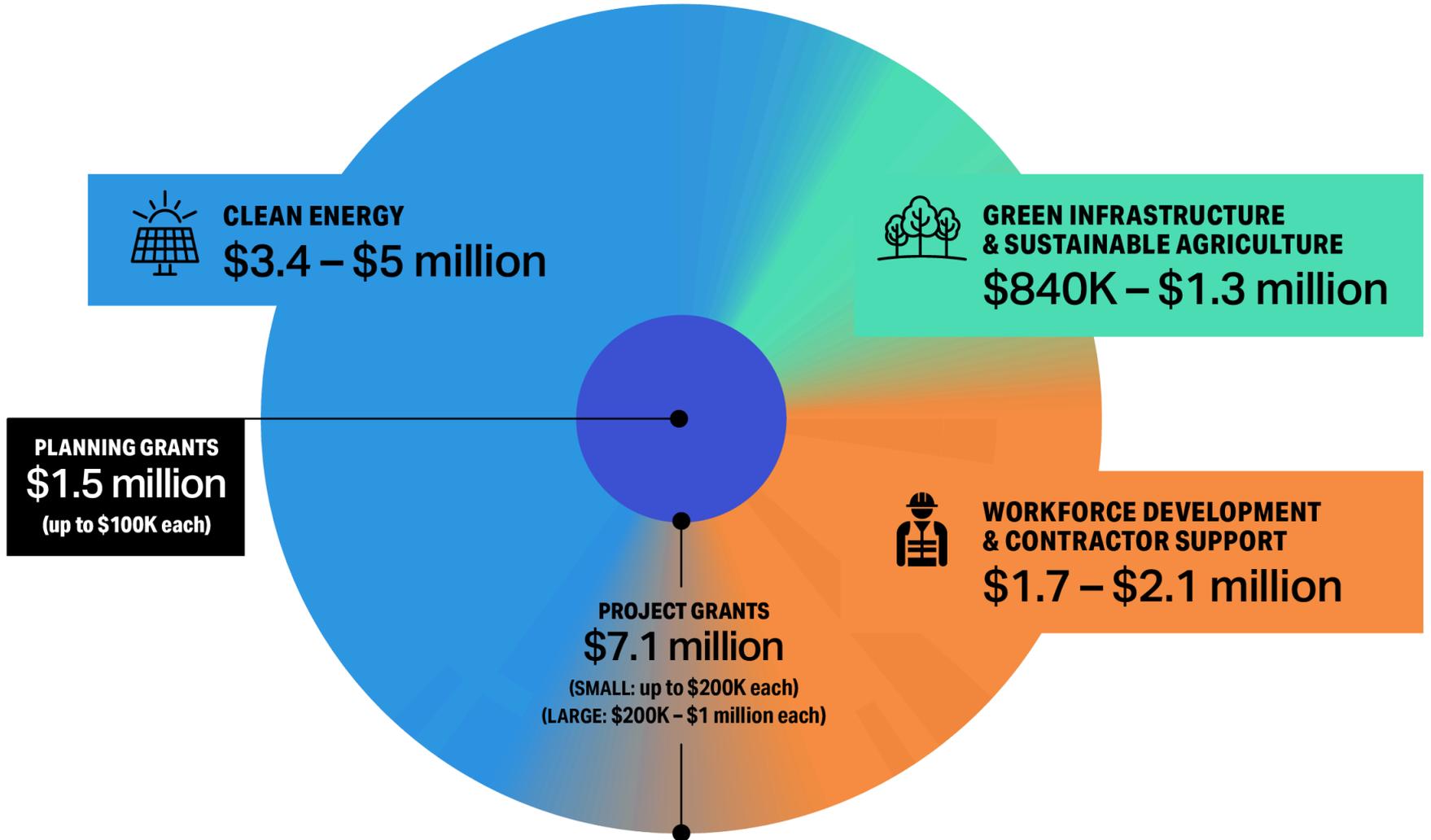
- ✓ IRS tax exempt;
- ✓ an active registered nonprofit with the State of Oregon; and
- ✓ not on the Disqualified Charities list with the Oregon Department of Justice.

Organizations can also apply through a fiscal sponsor that meets above requirements.

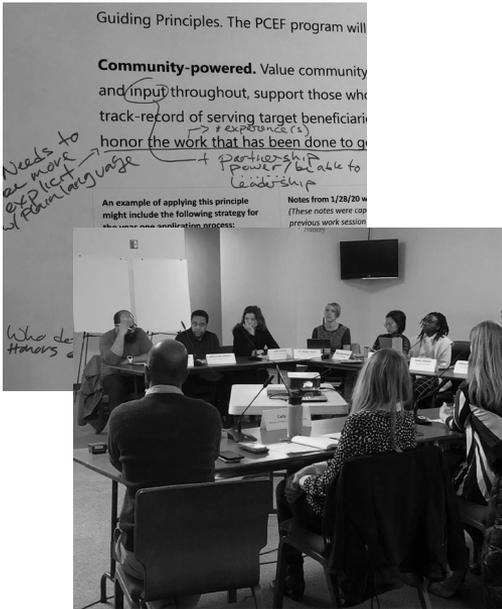
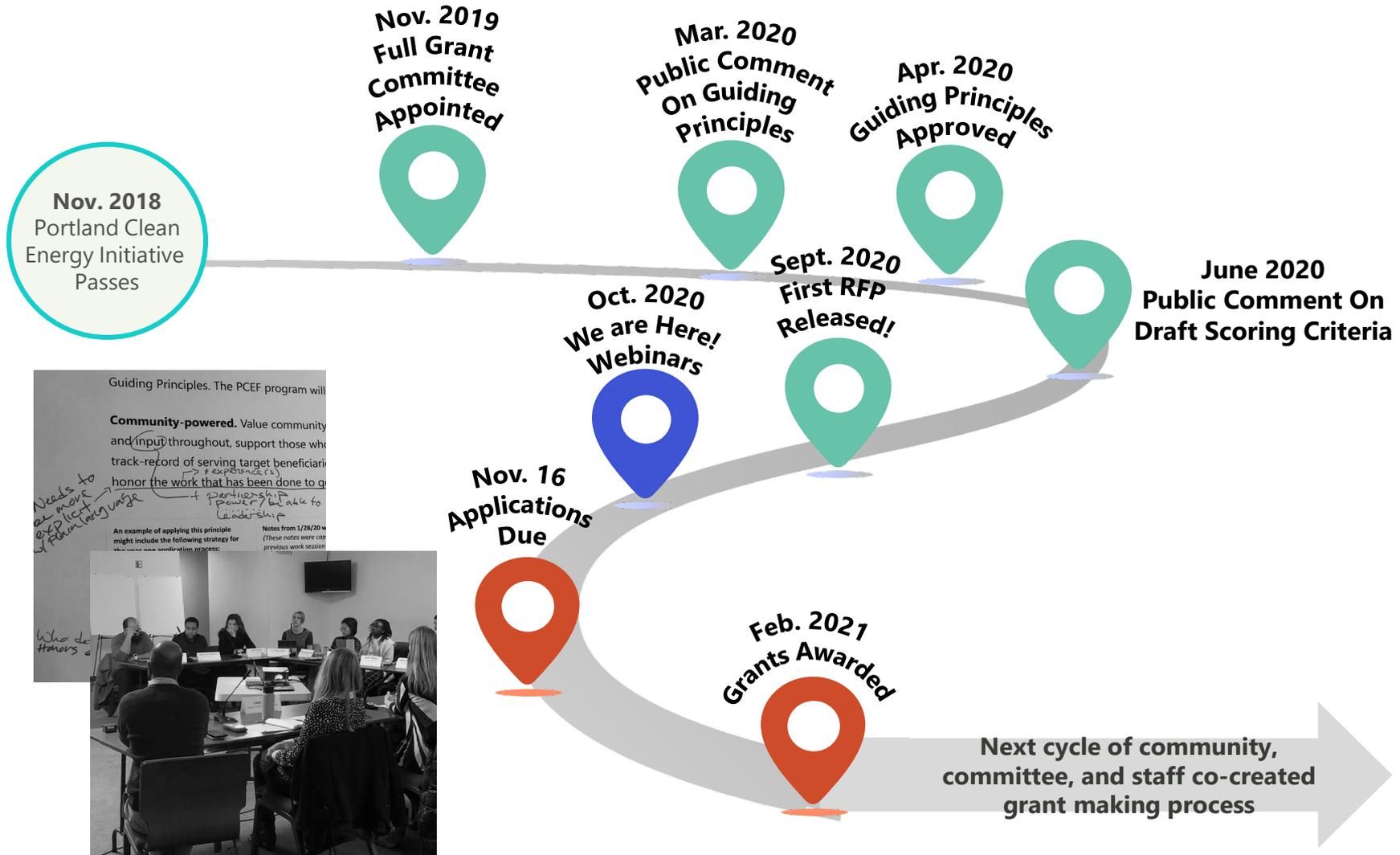
- Information about fiscal sponsorship available on the additional resources page on our website:  
<https://www.portland.gov/bps/cleanenergy/additional-resources#toc-fiscal-sponsorship->

# \$8.6 Million available now

\$40-60 MILLION ANNUALLY IN FUTURE YEARS



# A co-created process



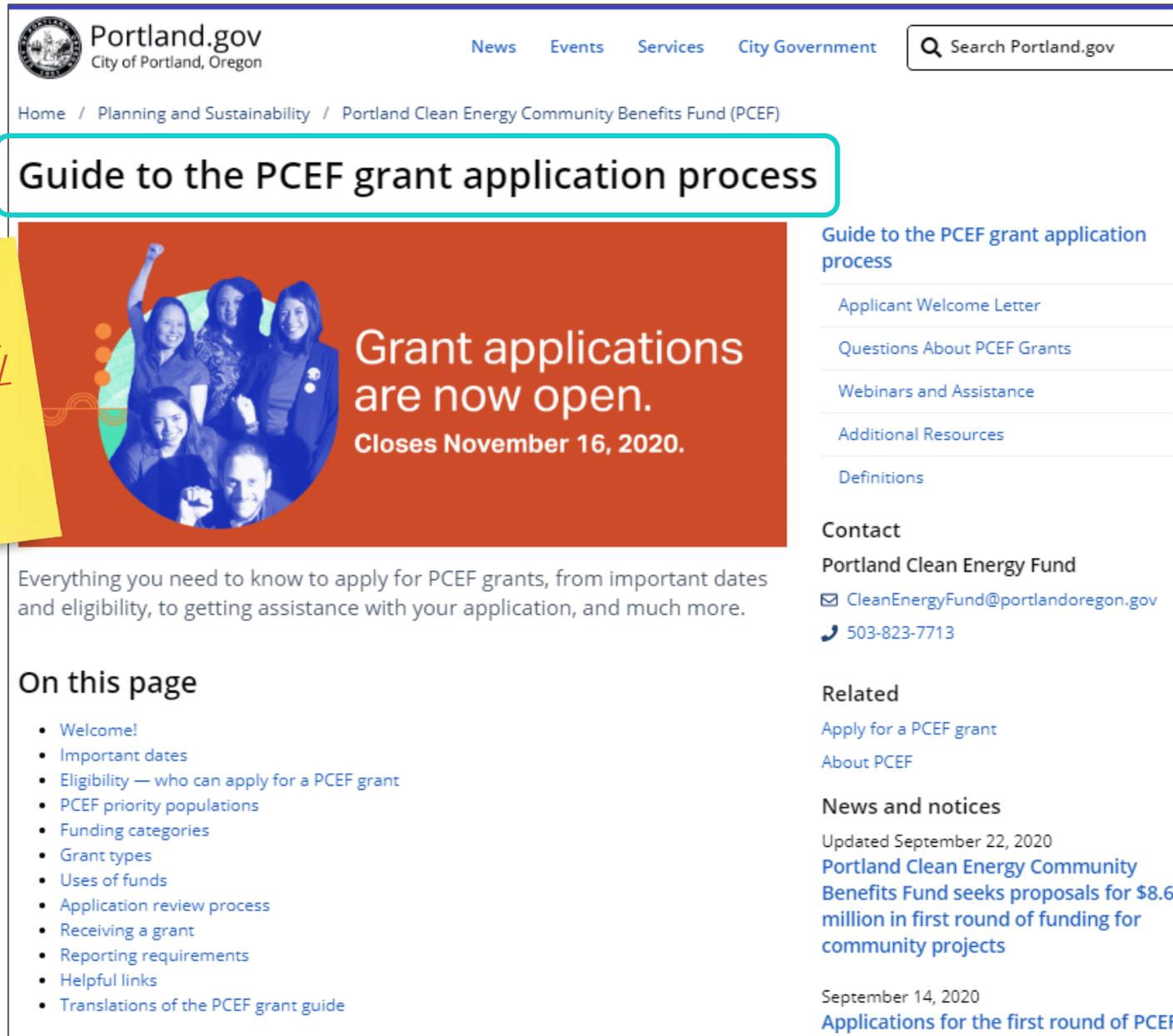
# Participant Live Poll

1. Interested in planning/small/large/not sure
2. Have none, some, or lots of experience applying for grants



# Navigating the application process

# ① Get started



**Portland.gov**  
City of Portland, Oregon

News Events Services City Government

Search Portland.gov

Home / Planning and Sustainability / Portland Clean Energy Community Benefits Fund (PCEF)

## Guide to the PCEF grant application process

**Grant applications are now open.**  
Closes November 16, 2020.

Everything you need to know to apply for PCEF grants, from important dates and eligibility, to getting assistance with your application, and much more.

### On this page

- Welcome!
- Important dates
- Eligibility — who can apply for a PCEF grant
- PCEF priority populations
- Funding categories
- Grant types
- Uses of funds
- Application review process
- Receiving a grant
- Reporting requirements
- Helpful links
- Translations of the PCEF grant guide

### Contact

**Portland Clean Energy Fund**

✉ [CleanEnergyFund@portlandoregon.gov](mailto:CleanEnergyFund@portlandoregon.gov)

☎ 503-823-7713

### Related

[Apply for a PCEF grant](#)

[About PCEF](#)

### News and notices

Updated September 22, 2020

**Portland Clean Energy Community Benefits Fund seeks proposals for \$8.6 million in first round of funding for community projects**

September 14, 2020

**Applications for the first round of PCEF**

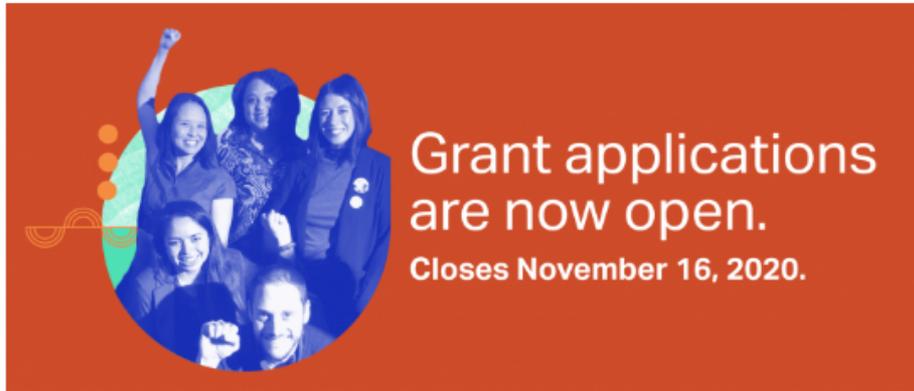
Start here:

<https://www.portland.gov/bps/cleanenergy/guide-pcef-grant-application-process>

**PCEF**



# Guide to the PCEF grant application process



## Guide to the PCEF grant application process

[Applicant Welcome Letter](#)

[Questions About PCEF Grants](#)

[Webinars and Assistance](#)

[Additional Resources](#)

[Definitions](#)

## Contact

### Portland Clean Energy Fund

[CleanEnergyFund@portlandoregon.gov](mailto:CleanEnergyFund@portlandoregon.gov)

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Everything you need to know to apply for PCEF grants, from important dates and eligibility, to getting assistance with your application, and much more.

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- [Welcome!](#)
- [Important dates](#)
- [Eligibility — who can apply for a PCEF grant](#)
- [PCEF priority populations](#)
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- [Grant types](#)
- [Uses of funds](#)
- [Application review process](#)
- [Receiving a grant](#)
- [Reporting requirements](#)
- [Helpful links](#)
- [Translations of the PCEF grant guide](#)

**Note guidance and requirements here**

[Guidance](#)

[for a PCEF grant](#)

[PCEF](#)

[and notices](#)

[September 22, 2020](#)

[Clean Energy Community Fund seeks proposals for \\$8.6 million in first round of funding for community projects](#)

[September 14, 2020](#)

[Applications for the first round of PCEF grants opening soon! Translations available upon request.](#)

## Welcome!

Interested applicants, please read the [welcome letter from Sam Baraso](#), PCEF Program Manager.

Next, read [about the PCEF program](#), including the Guiding Principles and the background of this



## Guide to the PCEF grant application process



Guide to the PCEF grant application process

Applicant Welcome Letter

Questions About PCEF Grants

Webinars and Assistance



## Questions about PCEF grants

### Common questions

#### 1. Can my organization apply for more than one grant?

Yes, there are no limits on the number of grants that an organization can apply for. However, different grant applications must be for distinctly different projects.

#### 2. Is leverage required in order to get a PCEF grant?

No, leverage (contributions to the project from another source, also called match) is not a requirement for PCEF funding. The application includes a question about leveraged resources in order to consider how to maximize the impact of limited dollars. There are points awarded for leverage for small and large grants but no additional points possible for planning grants.

#### 3. Some of the questions or criteria don't seem to apply to my project. Will that affect my score?

This page will be updated weekly on Wednesdays with answers to questions from webinars

Guide to the PCEF grant application process

Applicant Welcome Letter

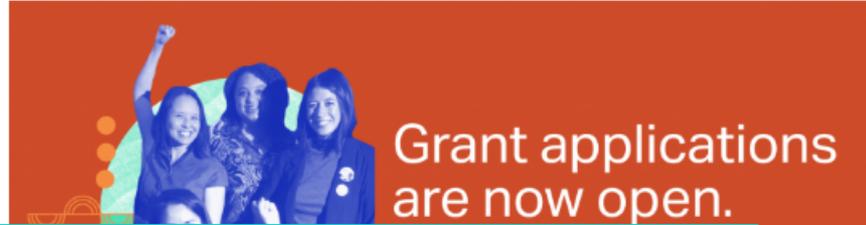
Questions About PCEF Grants

Webinars and Assistance

Additional Resources

Definitions

## Guide to the PCEF grant application process



### Guide to the PCEF grant application process

[Applicant Welcome Letter](#)

[Questions About PCEF Grants](#)

[Webinars and Assistance](#)

[Additional Resources](#)

[Definitions](#)

## Webinars and technical assistance

Staff will be available during the application period to answer questions and provide assistance to applicants.

We recognize that participation in this program requires skills and capacities that may not be readily available to all potential applicants. We offer a number of mechanisms to help applicants succeed, including:

- Information about each of the areas of focus, including regenerative agriculture, and workforce development, and information about priority populations categories.
- Webinars will be hosted during the application and guidance. Webinar dates and topics are posted below.
- Workshops and virtual trainings on specific topics are offered to assist potential applicants. Dates and topics are posted [Events](#) and posted below.

### Informational webinars

Friday, September 25, 12:1-1:30 p.m.

### Guide to the PCEF grant application process

[Applicant Welcome Letter](#)

[Questions About PCEF Grants](#)

[Webinars and Assistance](#)

[Additional Resources](#)

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**Schedule and recordings for webinars and trainings available here**

## Guide to the PCEF grant application process

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[Applicant Welcome Letter](#)

[Questions About PCEF Grants](#)

[Webinars and Assistance](#)

[Additional Resources](#)

[Definitions](#)

## Additional resources

The following is a list of resources for a variety of topics that may be useful to applicants and grantees.

[Guide to the PCEF grant application process](#)

[Applicant Welcome Letter](#)

### On this page

- [Climate action](#)
- [Complementary funding sources](#)
- [Demographic and geographic information](#)
- [Energy efficiency](#)
- [Housing and energy cost burden](#)
- [Fiscal sponsorship](#)
- [Green infrastructure](#)
- [Regenerative agriculture](#)
- [Renewable energy](#)
- [Sustainable purchasing and practices](#)
- [Transportation](#)
- [Workforce](#)

This is not an exhaustive list of resources. We will update the list over time and welcome your suggestions (email [cleanenergyfund@portlandoregon.gov](mailto:cleanenergyfund@portlandoregon.gov)).

The list is organized alphabetically by topic.

### Climate action

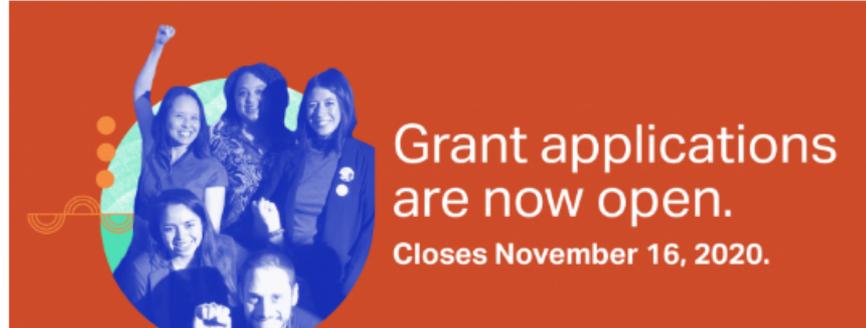
City and County reports, plans, and data regarding climate action and climate resilience.

- [City of Portland climate action and resilience plans and reports](#)

These may help you with parts of your application



## Guide to the PCEF grant application process



### Guide to the PCEF grant application process

[Applicant Welcome Letter](#)

[Questions About PCEF Grants](#)

[Webinars and Assistance](#)

[Additional Resources](#)

[Definitions](#)

**Priority population:** People and communities identified in PCEF legislation (code) as intended beneficiaries of the funding, either as recipients of climate investments or as workers and contractors on PCEF projects. There are two sets of priority populations defined in the PCEF code depending on the type of project.

1. For clean energy, green infrastructure or regenerative agriculture projects the priority populations are people of color and people with low income.
2. For workforce development and contractor support projects the priority populations are women, people of color, people with disabilities, the people who are chronically underemployed, and other historically disadvantaged groups.

**Note PCEF's definition of priority populations**

# ② Choose your grant type

<https://www.portland.gov/bps/cleanenergy/services/apply-pcef-grant>

Portland.gov  
City of Portland, Oregon

News Events Services City Government Search Portland.gov

Home / Planning and Sustainability / Portland Clean Energy Community Benefits Fund

## Apply for a PCEF grant

Steps to prepare for and submit an application for a grant from the Portland Clean Energy Community Benefits Fund (PCEF).

Online

- 1 Get started**

Review the [guide to the PCEF grant application process](#) for important dates, application process, getting assistance with your application, and more.
- 2 Choose your grant type**

Decide which [grant type\(s\)](#) you are going to apply for — Planning, Small, or Large. You may apply for more than one grant.

Are you applying for funds:

**To help you complete assessments or planning to develop a full project proposal?**

  - Yes — choose **Planning** grant.

**For a project that's already planned and needs less than \$200,000?**

  - Yes — choose **Small** grant.

**For a project that's already planned and needs between \$200,000 and \$1,000,000?**

  - Yes — choose **Large** grant.

Updated September 22, 2020  
Portland Clean Energy Community Benefits Fund seeks proposals for \$8.6 million in first round of funding for community projects

September 14, 2020  
Applications for the first round of PCEF grants opening soon! Translations available upon request.

# ③ Prepare your application

<https://www.portland.gov/bps/cleanenergy/services/apply-pcef-grant>

## ③ Prepare your application

The links below will open the application materials packet for each grant type.

Each application packet contains:

- A checklist
- Document with application questions
- Guidance document for answering application questions

The packet also contains two folders: **Resources** and **Required Attachments**.

The **Resources** folder contains files to provide additional information to help you prepare your application.

The **Required Attachments** folder contains all the forms that you will need to complete as part of your application. You will find links to these forms in the packet linked below.

Download the application materials packet for

[Planning grant](#)

[Small grant](#)

[Large grant](#)

If you need hard copies of the electronic application materials printed and mailed to you, please contact *Portland Clean Energy Fund*.

Download a .zip file of the application materials.

Attachments required for the application are only available here.

# ④ Submit your application

<https://www.portland.gov/bps/cleanenergy/services/apply-pcef-grant>

## ④ Submit your application

The application portal will be live soon

*If you would prefer to submit your application by emailing electronic documents or mailing in hard copies, contact [Portland Clean Energy Fund](#).*

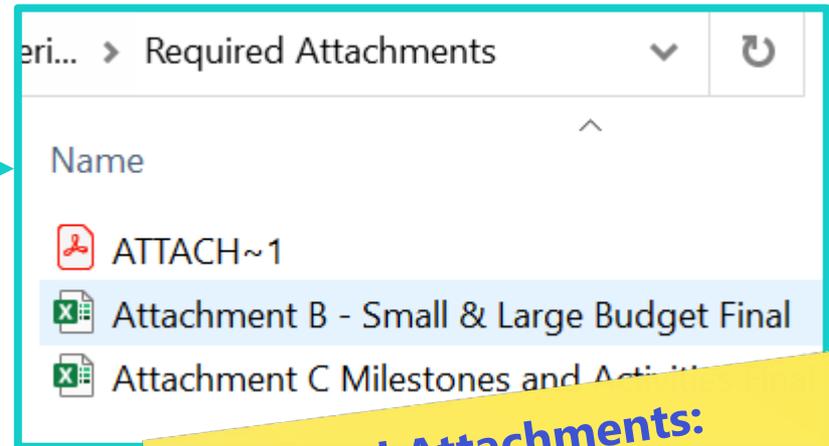
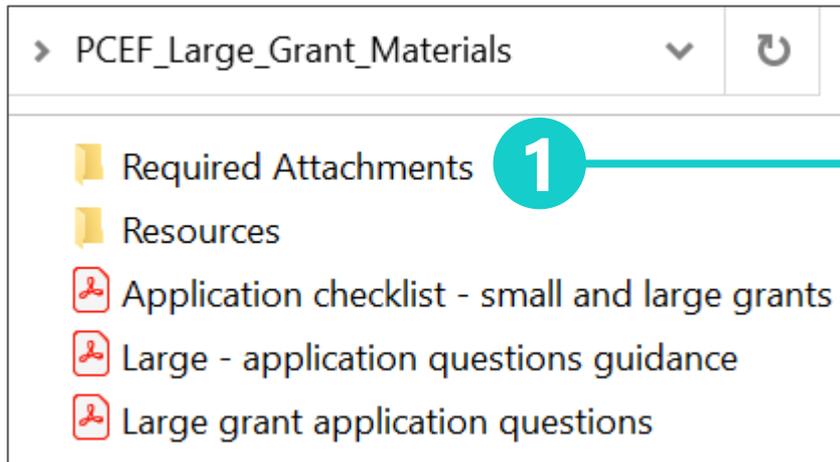
**Submit your application via online portal or email a document with answers to the application questions by November 16<sup>th</sup>.**

# September 2020 RFP material

# RFP material

## What is it all and do I have to read it?

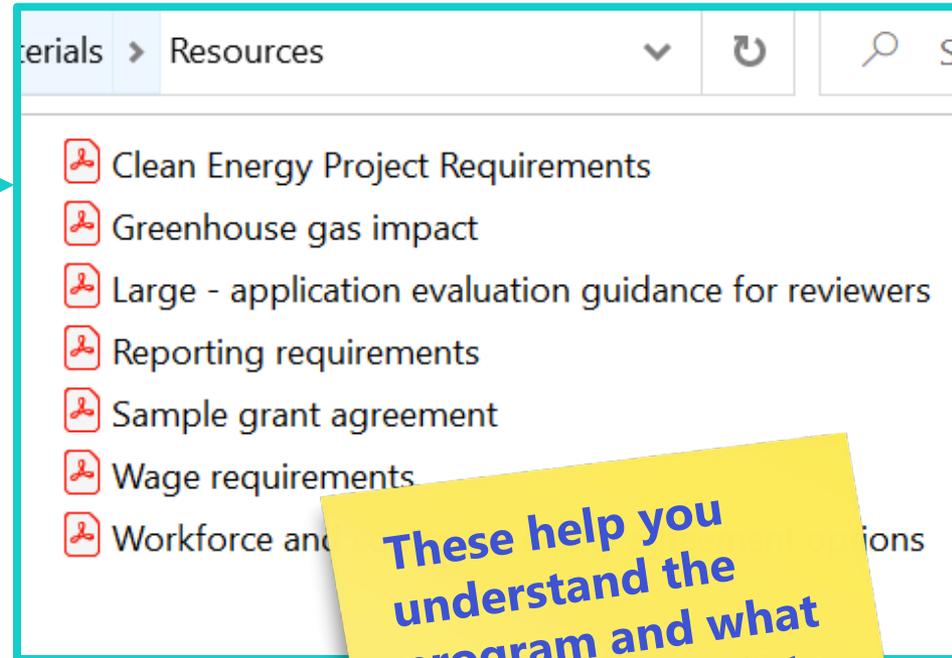
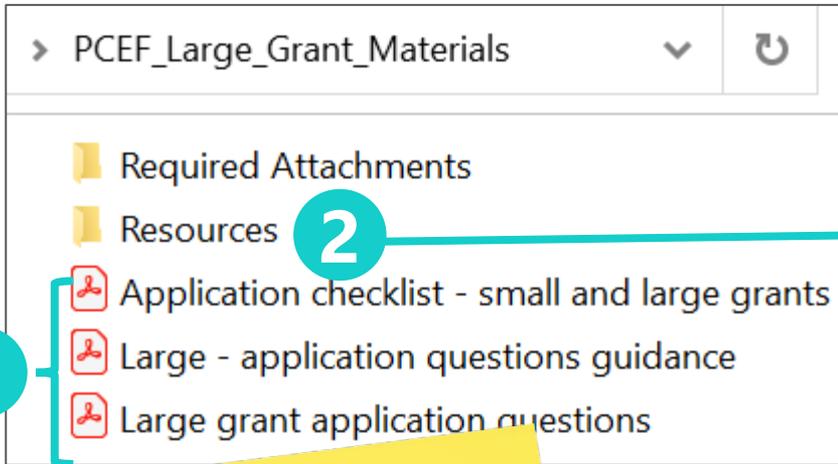
Application packets for each grant type -- planning, small, and large grants -- are structured the same way. Download the packet based on your grant type.



**Required Attachments:**  
**Attachment A – project description and scope info requirements (small and large grants only)**  
**Attachment B – budget**  
**Attachment C – milestones and activities**

# RFP material

## What is it all and do I have to read it?



**Checklist, guidance,  
and questions help  
you prepare your  
application for  
submittal**

**These help you  
understand the  
program and what  
you're getting into**

# Application questions



## Large grant application questions

In addition to the questions in this document, the application packet you downloaded through our website included an Attachment A (information required for project scope and description for different types of projects), Attachment B (budget template), and Attachment C (milestones and activities template).

For help in answering any of the questions in this application please see the *Large application question guidance* document that is part of the application packet. This guidance document has additional information and examples for each question in this application.

Note: starting in Section 2 of the application you will see a suggested word count with each of the questions that asks for a narrative answer. The suggested word counts are not requirements, they are to provide applicants a sense of the level of effort we might expect to see. Please do not feel your answer need to fit within the suggested word count range.

### Section 1: Applicant eligibility

Please complete this section about your organization (the applicant) and help us determine eligibility for PCEF funding.

- 1.1 Name of the applicant organization. If your organization is doing business as (DBA) other names, also include those names. \_\_\_\_\_
- 1.2 Are you submitting your application through a fiscal sponsor?
  - Yes
    - i. Name of the fiscal sponsor organization \_\_\_\_\_
    - ii. Attach the contract defining the fiscal sponsor agreement if available memorandum of understanding or other).
  - No
- 1.3 Applicant organization's Employee Identification Number (EIN). Note that EIN is also known as a federal Tax Identification Number (TIN): \_\_\_\_\_
  - i. If your organization does not have an EIN and is submitting with a fiscal sponsor, include the name of the fiscal sponsor.

**Application questions pdf:** use this to get familiar with the application and prepare answers.

**Online application:** linked through website, can be used to submit application.

## PCEF

### Section 1: Applicant eligibility

Section 2: Organizational information

Section 3: Project description and scope

Section 4: Environmental benefits

Section 5: Social benefits

Section 6: Workforce and contractor benefits and project budget

Section 7: Accompanying documents

Section 8: Application review

### Large grants

\$200,000 - \$1,000,000

Large grants can be used for projects that address climate change improvements (e.g. weatherization, solar installations, tree planting, community engagement, education). Grant funds can be used for equipment, land, costs associated with fulfilling requirements. Activities that will address climate change and advance racial equity funded by large grants should be completed within five years.

### Grant application title

Give your application a short title for reference.

\_\_\_\_\_

This is used only for reference. It will help your organization and PCEF staff reference your application.

### Section 1: Applicant eligibility

This section provides information about your (applicant) organization.

1.1 Name of the applicant organization. If your organization is doing business as (DBA) other names, also include those names. \_\_\_\_\_

# Attachment A

**This information needs to be included in the Project description and scope section of your application.**

If you have a proposal which includes more than one project type you need to submit information for both. E.g. a project that does energy efficiency improvements and installs solar panels on a home should look at information requirements for both.

## Attachment A: Information to include in project description and scope

### Renewable Energy

Include the information below in the project description and scope section of your application:

- Installed capacity
- Estimated annual kWhs the project will generate in first year of operation
- Describe energy storage
- Estimated lifetime kWhs the project will generate
  - a. Assume 30 years for solar installations
  - b. Assume 50 years for ground source heat pumps (life of below ground components, assume replacement of above ground components)
- Type fuel or energy the proposed project will displace (e.g. electric power, natural gas)
- Buildings served by project:
  - a. estimated number of units and total square footage of non-residential commercial buildings
  - b. estimated number of buildings, units per building, and total square footage of multifamily buildings
  - c. number of single-family residential units
- If the proposed project includes activities that are not part of the renewable energy installation but are designed to reduce GHG emissions please describe the activities including how the activities will contribute to GHG reductions. Examples of activities designed to reduce GHG emissions that are not part of the renewable energy installation include, but are not limited to, education, training, and community engagement related to climate issues.

### Energy Efficiency

Include the information below that applies to your project in the project description and scope section of your application:

- Estimated annual energy savings in first year reported in appropriate unit - kWhs/btus/therms/ccf/cords/gallons of heating fuel
  - a. Include energy related to space conditioning (heating and cooling), water heating, lighting and appliances
- Estimated lifetime energy savings
  - a. Assume 20 year life for whole home deep retrofit

# Attachment B - Budget

Three budget tables (for small and large grants)

1. Project budget table
2. Personnel detail table
3. Leverage table (does not apply to planning grants)

	A	B	C	D	E
4	<b>PROJECT BUDGET TABLE</b>				
5		Physical improvements/ Construction project costs	Description	Project costs that are not part of the physical improvement or installation. For example, education, community engagement project management, meetings.	
6					
7	Personnel (staff of grantee agency only)	\$ -		\$	
8	Travel	\$ -		\$	
9	Equipment, supplies and materials	\$ -		\$	
10	Contracted work	\$ -		\$	
11	Other				
12	<b>Expense category subtotals</b>	\$ -		\$	
13					
14	Overhead/admin				
15	Fiscal sponsor fee (if applicable)				
16	Percent total overhead/admin/fiscal sponsor fee	#DIV/0!	<--If RED, adjust before submitting		
17	<b>PCEF project budget - subtotal</b>	\$ -			
18	Match funds/resources	\$ -			
19	<b>Total Project Cost</b>	\$ -			
20					

**Image is table from  
small and large grant  
budget template.**

**Planning grant  
template is different.**

# Budget: tips and reminders

- **Budget for what you need!**
  - PCEF is not a lowest cost wins program
  - If you are doing construction, remember to include contingency
  - If your project is multi-year, make sure you are budgeting enough money to meet PCEF wage requirements in all years
- Pay attention to caps
  - Overhead caps (20% of project cost)
  - Fiscal sponsor fee (10% of project cost)
  - Combined fiscal sponsor fee and overhead cap is 25%
  - Total construction budget on non-energy related building improvements cap is 30%
- Grantees can be paid through reimbursement or partial advance options.

# Uses of funds

<https://www.portland.gov/bps/cleanenergy/guide-pcef-grant-application-process#toc-uses-of-funds>

We are calling attention to these elements so that applicants will: 1) know what is allowed, and 2) be encouraged to think creatively about how to meet environmental, racial and social justice goals.

- Project reporting
- Rent stability
- Materials, supplies and equipment purchases
- Land acquisition
- Transfer of property
- Building improvements
- Expenses associated with maintaining an investment
- Reimbursement for items procured or work completed prior to the effective date
- Items necessary to support recruitment, retention, and success of participants in a workforce development program
- Items necessary for businesses starting or scaling up
- Capitalizing a loan program
- Insurance costs

# Attachment C – Milestones and activities

	A	B	C
3	<b>EXAMPLE - Milestone 1 (M1)</b>	<b>Start date</b>	<b>End date</b>
4	Milestone title - Identify low-income elder homeowners for efficiency upgrades		2/1/2021
5	Activity title - Develop targeted outreach plan	Activity description - Identify low-income elders as well as elderly homeowners and provide outreach opportunities to reach them through various channels (person, online and through radio/television). Work with target community to develop outreach opportunities and material(s).	
6	Activity title - Implement outreach plan	Activity description - Do the activities identified in the outreach plan described above	
7	Activity title - Identify and verify income of interested participants	Activity description - Identify interested participants who meet income limits and verify that income can be self certified.	
8			
9	<b>Milestone 1 (M1)</b>	<b>Start date</b>	
10	Milestone title		1/1/1000

**Milestone:** significant markers in a project that indicate completion of a major event, decision point, stage, or goal.

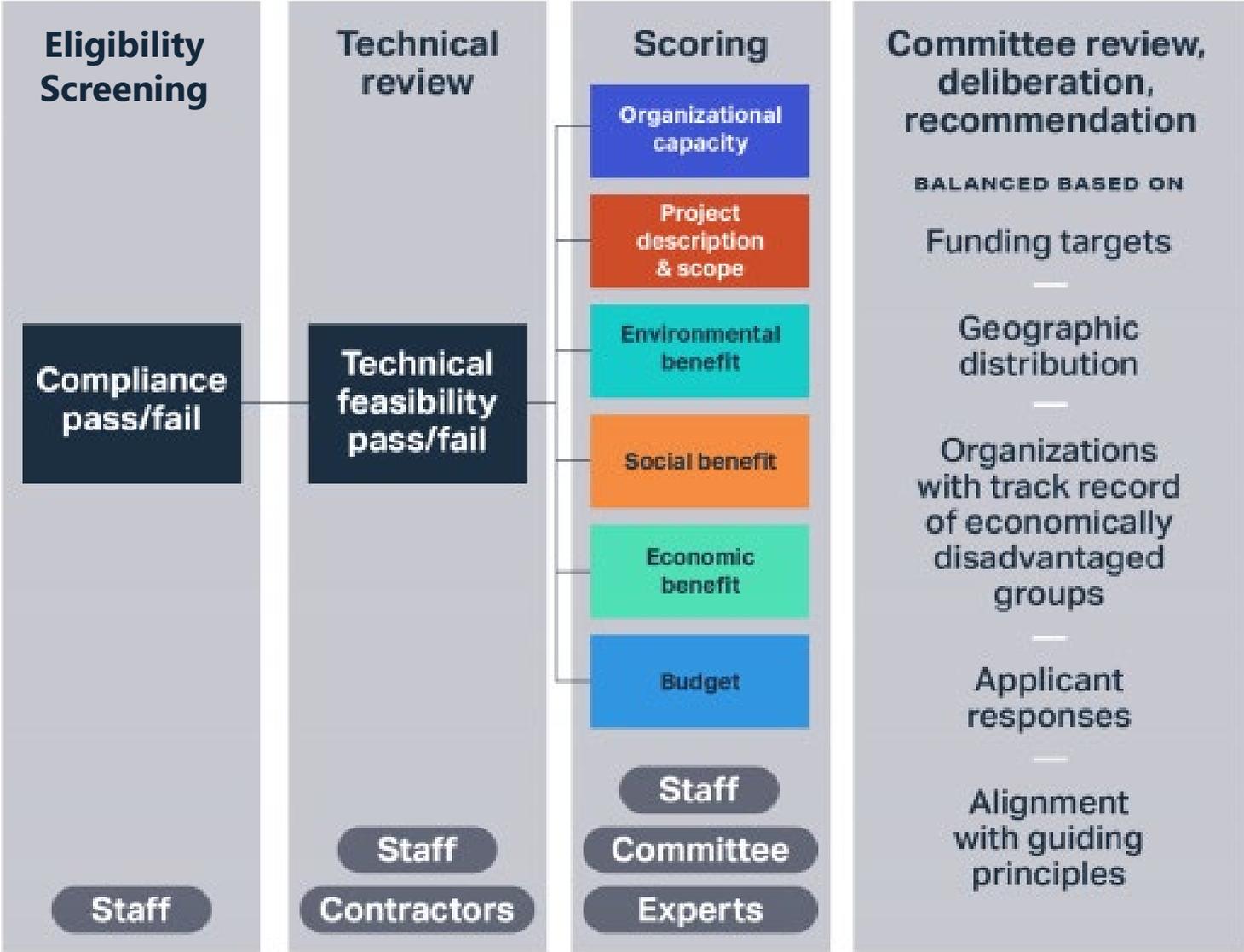
**Activities:** describe the grant funded activity that will lead to achieving each milestone.

# Q&A

Type your questions in the chatbox or raise your hand and the facilitator will call on you.

**If we don't get to your question, we will provide you an answer directly and post to the website if answer can't be found in our grant materials.**

# Grant review process



# Additional assistance

- Webinars and grant-writing trainings
  - <https://www.portland.gov/bps/cleanenergy/webinars-and-technical-assistance>
- Q&A section of the website will be updated on Wednesdays for duration of open application period
  - <https://www.portland.gov/bps/cleanenergy/questions-about-pcef-grants>
- If you have questions, we are here to help:
  - [Cleanenergyfund@portlandoregon.gov](mailto:Cleanenergyfund@portlandoregon.gov) or 503-823-7713

# Closing and exit poll

Important dates:

- **Questions about RFP due:** Oct. 29, 2020 at 11:59 p.m.
- **Applications due:** Nov. 16, 2020 at 11:59 p.m.
- **Awards announced:** Late February 2021

Exit poll questions:

- Was this helpful?
- How likely are you to apply?



COMMUNITY IS KEY



THANK YOU!

PORTLAND  
CLEAN ENERGY  
COMMUNITY BENEFITS  
FUND



Bureau of Planning and Sustainability

VISIT US ONLINE  
[portland.gov/bps/cleanenergy](http://portland.gov/bps/cleanenergy)