

COMMUNITY IS KEY



October 2020 PCEF Grant Writing Training - Narrative Building

Oct. 19, 2020, 4:00p.m.-
6:00p.m.

PORTLAND
CLEAN ENERGY
COMMUNITY BENEFITS
FUND



Bureau of Planning and Sustainability

VISIT US ONLINE
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 will be recorded. (after introductions)

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.

AGENDA FOR TODAY

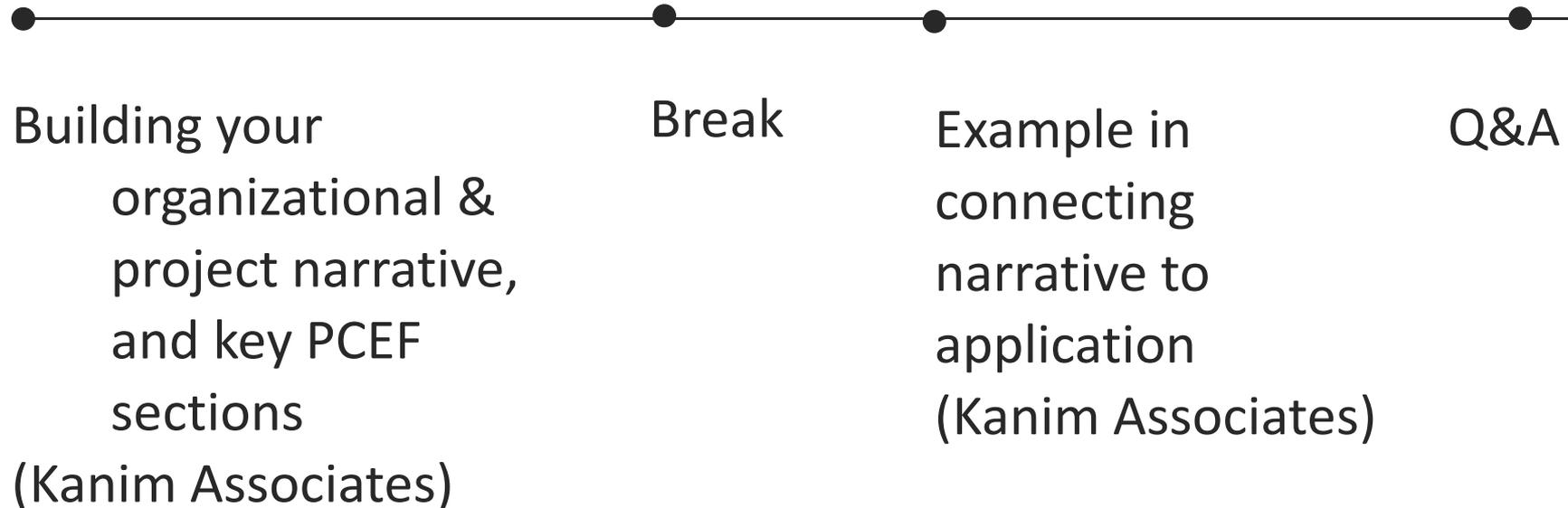


Introductions
(All via chat +
presentation team)

About PCEF
(PCEF Staff)

Approach to Grant
Writing
(Kanim Associates)

AGENDA FOR TODAY (continued)



Welcome!

Thank you for being here.

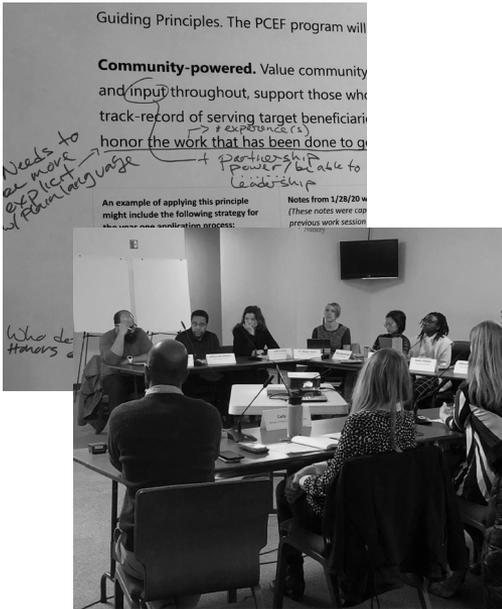
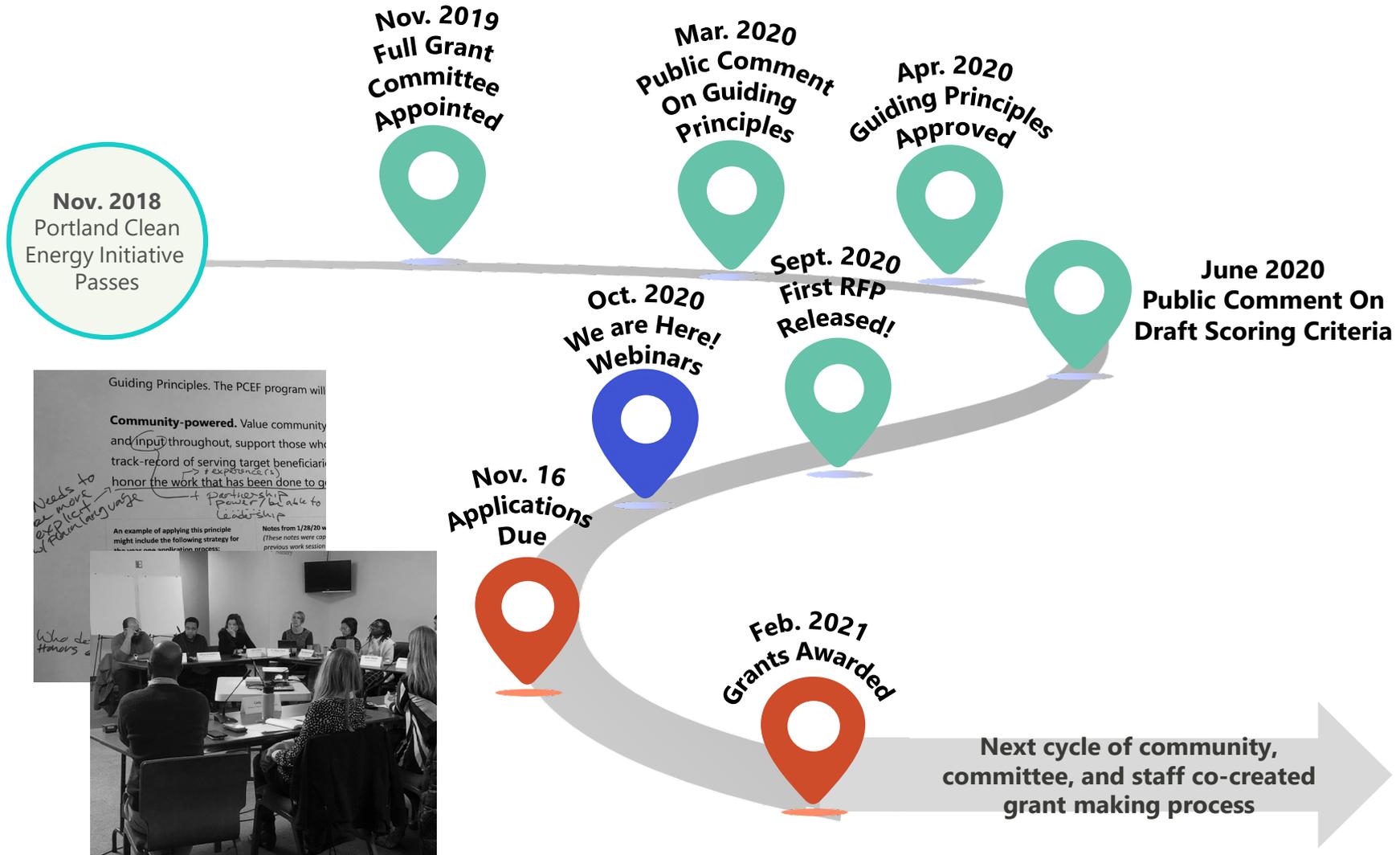
We will pause periodically to answer any questions that are put into the chat and hold other questions for the Q&A at the end of the training.

Introduction Guidance

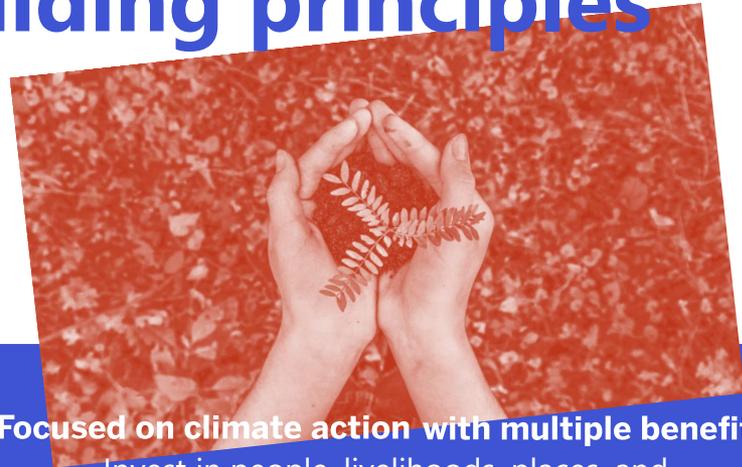
1. Name, organizational affiliation, and one thing that you would like to take away from this training.
2. Poll: How familiar are you with developing grant applications?:
 - I have never applied for a grant before
 - I have applied for 1 to 5 grants previously
 - I have applied for 6 to 10 grants previously
 - I have applied for LOTS of grants (+10)



A co-created process



PCEF 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

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->

What kinds of projects can be funded?

Year 1: \$8.6 million

Year 2+: \$40-60 million annually



Innovation

Green Infrastructure and Regenerative Agriculture



5%

10-15%



Clean Energy Programs

40-60%

PCEF
Funding
Areas

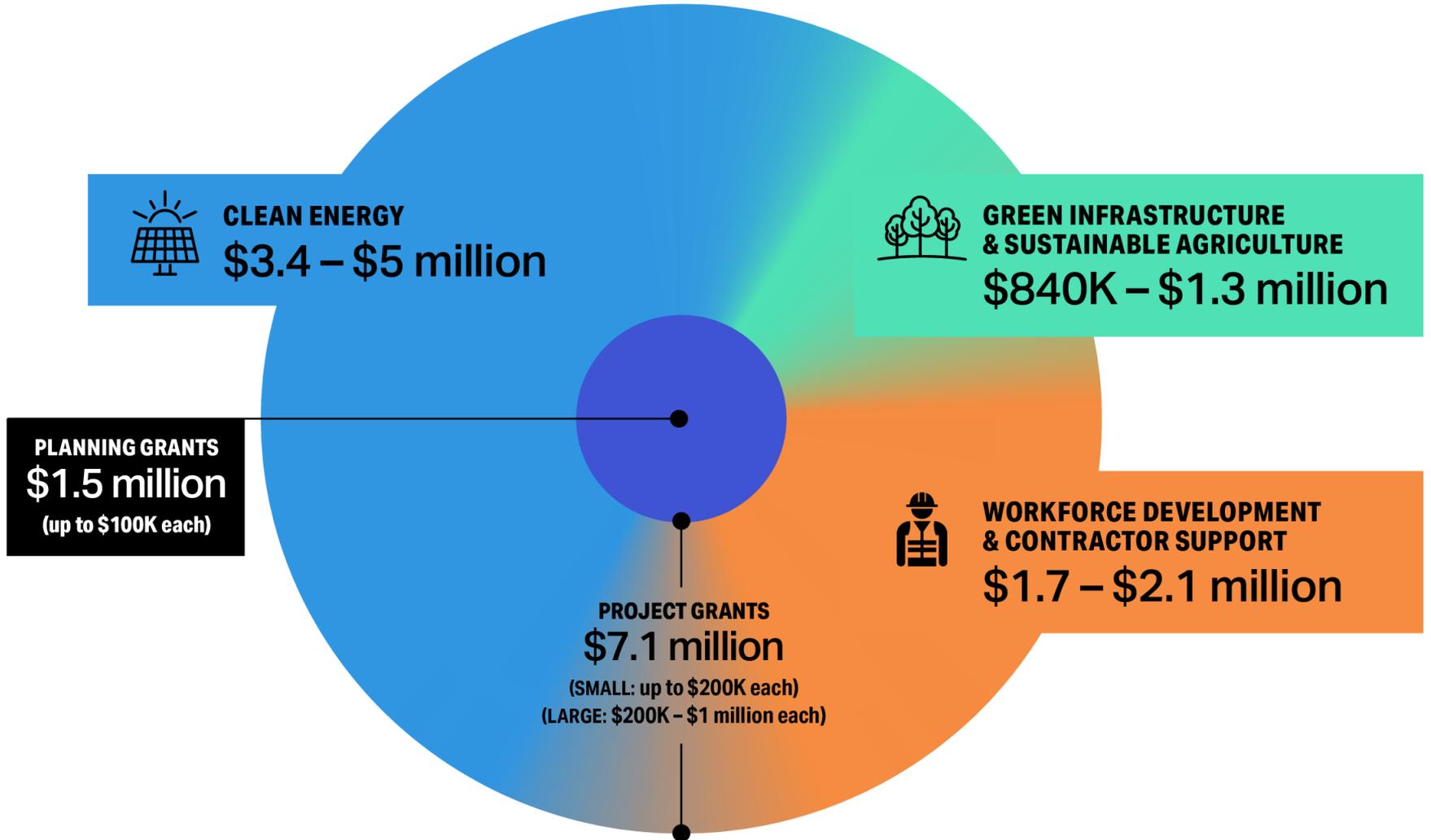
Contractor Training & Support
Workforce Development



20-25%

\$8.6 Million available now

\$40-60 MILLION ANNUALLY IN FUTURE YEARS



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

Start here:
<https://www.portland.gov/bps/cleanenergy/guide-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

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

☎ 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

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 and training information about priority populations can be found on the [PCEF website](#).
- Webinars will be hosted during the application and guidance. Webinar dates and topics will be posted below.
- Workshops and virtual trainings on specific topics will be offered to assist potential applicants. Dates and topics will be 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](#)

[Definitions](#)

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).

The list is organized alphabetically by topic.

Climate action

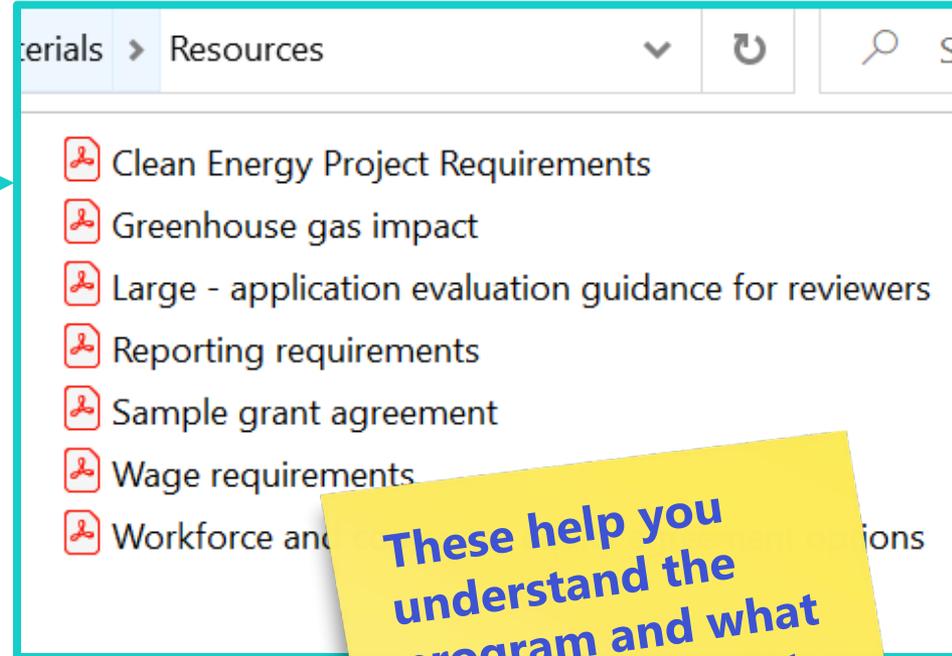
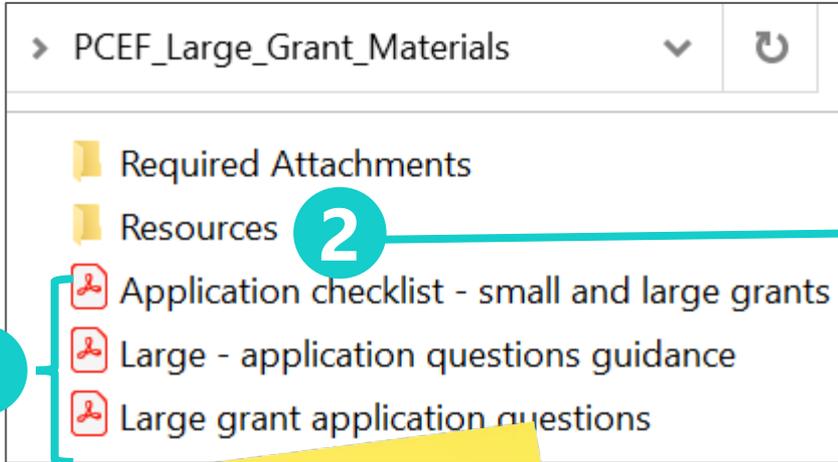
City and County reports, plans, and data regarding climate action and climate resilience.

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

These may help you with parts of your application

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**

How to 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 if you are 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 16th.

Also can submit via:

- Email: cleanenergyfund@portlandoregon.gov
- Mail:

Attn : PCEF

City of Portland | Bureau of Planning & Sustainability

1900 SW 4th Ave, Suite 7100, Portland, OR 97201

KANIM ASSOCIATES, LLC

We are a Native American owned professional consulting firm. Office locations in Portland, Warm Springs, and Coos Bay, Oregon.

*Direlle R. Calica (Citizen of the Confederated Tribes of Warm Springs) and
Shirod Younker (Citizen of the Coquille Indian Tribe)*

Today we are here to offer one perspective and guidance on grant preparation, some lessons we have learned through our work on grant writing and grant-funded projects, and some examples of how we've approached similar funding opportunities. We offer this insight, with the hope that it helps demystify the grant preparation process, provide some context for raising questions, and a chance to fully consider this funding opportunity. We are in no way guaranteeing that our approach will result in a successful PCEF award.



Introduction to your
Training Provider



NARRATIVE BUILDING: TELLING YOUR STORY, SHARING YOUR VISION



Vision

What is the outcome that you and your partners have in mind for the funding opportunity?

Objectives

What are you seeking to accomplish through this funding opportunity?

**Are there community targets?
Partnerships? What are the objectives?**

Are they connected to PCEF priority populations?

Goals

What is the enduring legacy that you envision through this process?

What is the goal or are there multiple goals?



Information Management

Preparing to Apply

Review the application for the Portland Clean Energy Fund.

Are we ready to apply and what are we ready to apply for?
Small, Large, or Planning Grant.

- Project idea or concept ready
- Partnerships or plan in place
- Team ready to participate

Writing your Application

Do we have our materials ready for the application process?

Is our cache of documents ready including our EIN, and related organic documents?

- Documentation ready
- Files on hand for application
- Update organic documents and so forth

PCEF Application Submission

Is our application, partnership documentation, and so forth ready for the PCEF timeline?

- Develop application timeline and plan supporting documents
- Preparation and submission

DEVELOPING YOUR NARRATIVE & RESPONSES



ENGAGEMENT

What is our community engagement approach? Do our constituents and community members understand how we are going to apply for PCEF and utilize PCEF Funds?

ELIGIBILITY

Examine and have a clear understanding of the eligibility requirements.

This is critical to clearly understand your eligibility and the roles of your partners.

READ THE PCEF
INFORMATION

Have we read through and understand the PCEF funding opportunity and materials.

PREPARATION
PLAN

We are making a checklist of the essential materials needed for this application and related applications.

TIMELINE

We are working on a timeline for this application and are working to schedule any needed meetings with our Board or Partners.

The larger project scope, the more partners, and complexity the timeline becomes critical.

OUTLINE
OBJECTIVES

Internally, we are setting time and effort aside to ensure that we can define time for our project goals and objectives.

PREPARING THE NARRATIVE AND SUBMISSION



RESEARCH &
GATHER

Create or ensure there is sufficient time to gather information, knowledge, or data for this application.

DRAFT
NARRATIVE

Schedule time to draft the Grant Narrative.

BUDGET

Develop the budget for the proposal and ensure that Narrative and Budget support.

BOARD
APPROVALS

Ensure the organizational structure has time to approve or review the proposal.

Timeline: What will need approval, such as partnership agreements, funding agreements, MOUs/MOAs, internal review, etc.

PREPARE TO
SUBMIT

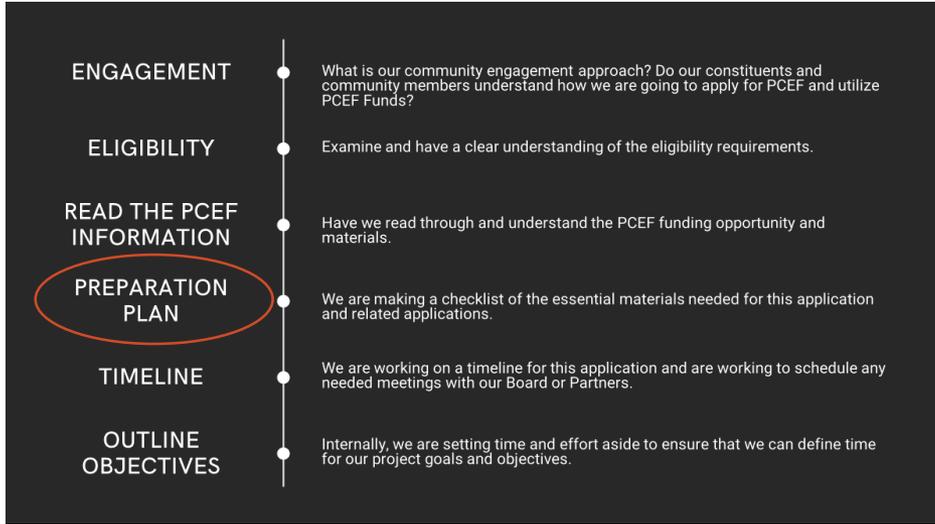
Schedule time to submit and apply for the PCEF resources.

Create a "FINAL READY TO SUBMIT" file, reserved for only the materials you're planning to submit, cut-n-paste, or upload.

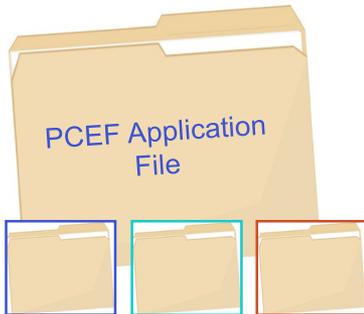
SUBMIT

It sounds easy enough but just ensure that there is sufficient time to submit the application.

Be good to yourself – don't wait until 11:50 p.m. to get ready to submit.



Preparation Task	Date
Engagement & Partnerships	October 1-7
Review Grant Materials & Eligibility	October 7--12
Preparation Plan & Schedule	October 1
Develop Budget & Project	October 15-22
Research Information	October 15-22
Draft Budget & Narrative	October 23-30
Review & Approvals	November 2-6
Prepare to Submit	November 9-11
Submit	November 12

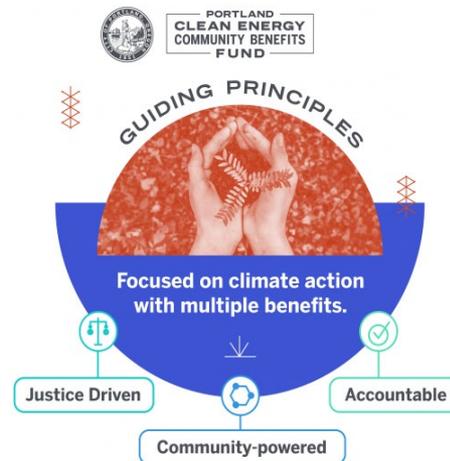


Create a file for your required documents, specifically PDFs, supporting documents, etc. Create a file for "Final" documents that are ready to submit.

This is an example....

WRITING YOUR PCEF NARRATIVE

Your Project
Vision and
Goals



KEEP YOUR VISION IN FOCUS

Going through the PCEF Materials, Checklist, Forms, and Attachments. It can seem cumbersome, if not a bit tedious to manage information and analysis.



Job Training - Residential Solar - Energy Efficiency Training

- What are we doing?
- Why are we doing this?
- When are going to do this?
- Where are we going to do this?
- How are we going to get it done?
- How much is this going to cost?

PCEF APPLICATION QUESTIONS

Planning Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Section 4: Project Budget*

Small Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Project 4: Environmental Benefits
- Section 5: Social Benefits
- Section 6: Workforce and contractor benefits
- Section 7: Budget*

Large Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Section 4: Environmental Benefits
- Section 5: Social Benefits
- Section 6: Workforce and contractor benefits – Construction related questions
- Section 7: Budget*

*Reference the budget – there is a separate PCEF Budget Development Webinar

REVIEW THE EVALUATION CRITERIA

This information is available in the “Resource File”

Planning – application evaluation guidance for reviewers

Planning grants will be scored on a 100-point scale. Points are awarded across three categories:

1. Organizational information – 45 possible points
2. Project description and scope - planning methodology – 45 possible points
3. Budget – 10 possible points

Small - application evaluation guidance for reviewers

Small grant application evaluation guidance for reviewers Small grants will be scored on a 100-point scale. Points are awarded to criteria across six categories:

- Organizational information
- Project description and scope
- Environmental benefits
- Social benefits
- Workforce benefits
- Budget

The number of points for each criteria varies depending the project type: 1) projects that include physical improvements that will employ workers in the construction trades (e.g., weatherization, solar installation, barn installation, site grading), 2) projects that include physical improvements that will not employ workers from the construction trades (e.g., tree planting, farming), and 3) projects that do not include physical improvements or utilization of workers in the construction trades...

Large – application guidance for reviewers

Large grant application evaluation guidance for reviewers Large grants will be scored on a 100-point scale. Points are awarded to criteria across six categories:

- Organizational information
- Project description and scope
- Environmental benefit
- Social benefit
- Workforce benefit
- Budget

The number of points for each criteria varies depending the project type: 1) projects that include physical improvements that will employ workers in the construction trades (e.g., weatherization, solar installation, barn installation, site grading) and have a construction budget for a single site that includes \$500,000 or more of PCEF funding 2) projects that include physical improvements that will employ workers in the construction trades (e.g., weatherization, solar installation, barn installation, site grading) and have a construction budget that includes less than \$500,000 of PCEF funding ...

INFORMATION REQUIREMENTS FOR PCEF



Up to
\$100,000

Planning
Proposal

Small & Large
Project Proposal

Information demand
is lighter

4 Required Sections

Information demand
is greater = request
for resources

Added levels of detail
and specificity

Construction and
non-construction
requirements

PCEF APPLICATION QUESTIONS

Planning Project

- Section 1: Applicant Eligibility (18 questions)
 - Demographic Data
 - Tax and Business Information
 - Fiscal Sponsor Information
- Section 2: Organizational Information and Financials (8 questions)
- Section 3: Project Description and Scope and Project Team Experience and Qualifications (4 questions)
- Section 4: Project Budget*

Small Project

Large Project

*Reference the budget – there is a separate PCEF Budget Development Webinar

1.1 Name of the applicant organization. (and DBA Name, if applicable)

1.2 What type of future project is this planning grant for? (check all that apply)

- Energy efficiency or renewable energy
- Green infrastructure or regenerative agriculture
- Workforce or contractor development
- Innovation/Other (please explain): _____

1.3 Are you submitting your application through a fiscal sponsor?

- If Yes, name fiscal sponsor and attach any sponsorship agreement documents

1.4 Applicant organization's (or fiscal sponsor) Employee Identification Number (EIN) (also known as Tax Identification Number):

1.5 Applicant organization mailing address:

1.6 Name of applicant organization's executive director, CEO or president (if not available, list board chair)

1.7 Primary contact person for this application: Name, Title, Email, Phone

NARRATIVE QUESTIONS

SECTION 1

NARRATIVE QUESTIONS FOR A PLANNING GRANT

SECTION 2

2.1 What is your organization's purpose or mission? (50 to 100 words)

2.2 Describe how your organization prioritizes and serves one or more of the PCEF priority population(s). Include which population(s) you prioritize and what percent of your organization's work is focused on serving that population(s). If applicable, include any supporting documents noted in your explanation. (100 to 250 words)

2.3 How do you connect with the community you serve? Briefly describe how your organization does outreach, engagement, and/or community organizing. (100 to 250 words)

2.4 Is the proposed project designed to primarily benefit any of the following PCEF priority populations: people of color, women, people with disabilities, people with low income, or people who are chronically underemployed?

- If Yes, briefly describe the specific population(s) the project is designed to benefit, including an estimate of the percent of project beneficiaries that will come from that population (e.g. 75% of project benefits will go to women of color), and continue to question
- If No, briefly describe who the proposed project is intended to benefit and then skip to question 2.7. Do NOT include contractors and people employed to work on the project; they are addressed in another section. (50 to 100 words)

2.5. *Profile of your organization's leadership and staff – consider that of your fiscal sponsor.*

Project scope: (750 to 1,500 words not including Attachment C -milestones and activities)

- a. Project description: In one or two paragraphs, describe the proposed project and what it seeks to accomplish.
- b. What challenges or barriers to project success do you anticipate, and how do you plan to address them?
- c. In what ways do you plan to engage the community and people who are intended to benefit in the proposed project?
- d. Complete the project milestones and activities template in Attachment C.
- e. Provide the information requested in Attachment A for each of the project types that are part of the proposed project (e.g., if the project will include energy efficiency and green infrastructure, complete the attachment A questions for both).

NARRATIVE QUESTIONS FOR A PLANNING GRANT

SECTION 3

INFORMATION REQUIREMENTS FOR PCEF



PCEF APPLICATION QUESTIONS

Planning Project

Small Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Project 4: Environmental Benefits
- Section 5: Social Benefits
- Section 6: Workforce and contractor benefits
- Section 7: Budget*

Large Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
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- Section 5: Social Benefits
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- Section 7: Budget*

*Reference the budget – there is a separate PCEF Budget Development Webinar

Section 4: Environmental benefits (Intro)

PCEF-funded projects must be designed to reduce impacts of climate change. For most projects, staff will calculate GHG impact using a standard model, based on information included in the project description section of the application. Staff will perform calculations to both reduce the burden on applicants and to provide consistency in estimating GHG impact.

4.1 Does the proposed project consist solely of activities that are not physical improvements (e.g., workforce and contractor development, education, outreach)?

- Yes – skip to question 5.4
- No

4.2 If applicable, describe additional environmental benefits of the project that are not related to GHG reduction (e.g., improved air quality, flood protection, water quality, habitat creation). (100 to 300 words)

**NARRATIVE
QUESTIONS
for Small &
Large
Grants**

SECTION 4

Section 5: Social benefits (Intro)

5.1 Does the proposed project consist solely of activities that are not physical improvements (e.g., workforce and contractor development, education, outreach)?

- Yes – skip to question 5.4
- No

5.2 Cost savings: If the proposed project will result in cost savings, answer the following: (100 to 300 words)

- a. What costs will be saved (e.g., energy utility bills, food costs, transportation costs) and for whom? Will these cost savings go to households, an organization serving a PCEF priority population, or to another nonresidential facility?
- b. What are the estimated average annual cost savings as a percent of total annual bills (e.g., 10% annual bill savings per household)? How were the savings calculated?

**NARRATIVE
QUESTIONS
for Small &
Large
Grants**

SECTION 5

Section 6: Workforce and contractor benefits (Intro)

This section applies only to projects with construction-related physical improvements that will require contractors and/or workers for construction-related services. This section does not apply to projects that focus solely on farming, regenerative agriculture, and tree planting because the questions in this section pertain to prevailing wages and apprentice training programs for workers in trades for which prevailing wages and training programs have been defined by the state's Bureau of Labor and Industry (BOLI).

Note : Thresholds for additional requirements and info at \$350k and \$500k of construction activities at a single site.

**NARRATIVE
QUESTIONS
for Small &
Large
Grants**

SECTION 6

Quick Break

Stretch! (And think of questions)

EXAMPLE PROCESS – NOT A PCEF PROPOSAL

KEEP YOUR VISION IN FOCUS

Going through the PCEF Materials, Checklist, Forms, and Attachments. It can seem cumbersome, if not a bit tedious to manage information and analysis.



Job Training - Residential Solar - Energy Efficiency Training

- What are we doing?
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- How much is this going to cost?

EXAMPLE : PROJECT APPROACH - DELIVERABLES

The following examples are not actual PCEF proposals nor projects. The example we are providing is purely illustrative and is for demonstrative purposes only. In actuality, the project was successful in attaining grant funds (again not from PCEF) and took place over a 3-year period. It is in final completion stage and preparing for final reporting.

The Project was to “Build an Energy Efficiency Network for Tribal Housing” – the project goal was to first provide community capacity building to tribal communities in the NW and tribal housing authorities. Next, we sought to provide training to tribes specifically to their housing, finance, and elected leadership. Finally, we sought to identify “lowest hanging fruit” for tribes to apply energy efficiency measures to tribal housing, specifically looking at home heating and heat pump technology. In the end, we supported tribal partnerships to begin installing heat pump technology to tribal elders’ housing.



Step 1: Community Outreach & Capacity Building

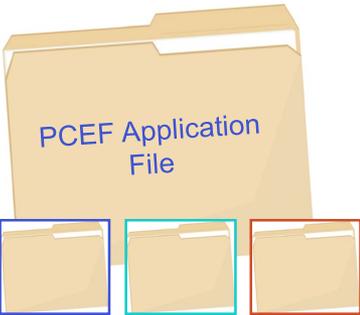
Step 2: Training

Step 3: Pilot Demonstration Project

This is an example....

ENGAGEMENT	• What is our community engagement approach? Do our constituents and community members understand how we are going to apply for PCEF and utilize PCEF Funds?
ELIGIBILITY	• Examine and have a clear understanding of the eligibility requirements.
READ THE PCEF INFORMATION	• Have we read through and understand the PCEF funding opportunity and materials.
PREPARATION PLAN	• We are making a checklist of the essential materials needed for this application and related applications.
TIMELINE	• We are working on a timeline for this application and are working to schedule any needed meetings with our Board or Partners.
OUTLINE OBJECTIVES	• Internally, we are setting time and effort aside to ensure that we can define time for our project goals and objectives.

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Develop Budget & Project	October 15-22
Research Information	October 15-22
Draft Budget & Narrative	October 23-30
Review & Approvals	November 2-6
Prepare to Submit	November 9-11
Submit	November 12



Create a file for your required documents, specifically PDFs, supporting documents, etc. Create a file for "Final" documents that are ready to submit.

Examined: Eligibility requirements and the review/selection process.

RESEARCH &
GATHER

DRAFT
NARRATIVE

BUDGET

BOARD
APPROVALS

PREPARE TO
SUBMIT

SUBMIT

● Create or ensure there is sufficient time to gather information, knowledge, or data for this application.

● Schedule time to draft the Grant Narrative.

● Develop the budget for the proposal and ensure that Narrative and Budget support.

● Ensure the organizational structure has time to approve or review the proposal.
Timeline: What will need approval, such as partnership agreements, funding agreements, MOUs/MOAs, internal review, etc.

● Schedule time to submit and apply for the PCEF resources.

Create a "FINAL READY TO SUBMIT" file, reserved for only the materials you're planning to submit, cut-n-paste, or upload.

● It sounds easy enough but just ensure that there is sufficient time to submit the application.

Be good to yourself – don't wait until 11:50 p.m. to get ready to submit.

EXAMPLE Project Narrative Outline

Step 1: Community Outreach & Capacity Building

- Develop organizational capacity to support energy efficiency in the tribal housing sector.
- Leadership development
- Training for tribal housing boards and staff

Step 2: Training

- 3 Training events in OR, WA, and an Executive Session workshop for 30-50 people each event
- Link tribal housing staff with energy efficiency training resources
- Technical Assistance and peer-to-peer support on energy efficiency - heat pump installation

Step 3: Pilot Demonstration Project

- Help 1-3 tribes develop an energy efficiency project, identify funding opportunities, and provide TA for grant writing and support.

EXAMPLE – Tribal Housing Energy Efficiency Training Series Suquamish, WA				
Task Budget Item	Estimated	Actual	Proj. Category	Proj. Source
Personnel: Executive Director hours	\$1,550		Personnel	Grant
Contractor: Training Team	\$5,000		Contract Svcs	Grant
Venue: Clearwater Resort	\$3,000	\$2,884	Leveraged	Sponsor: Tribe
Food & Catering: Clearwater Resort	\$3,000		Contract Svs	Grant
Audio Visual: Clearwater Resort	\$450		Contract Svc	Grant
Training Materials: Vendor 1 Event Printing; Vendor 2 Materials; Vendor 3 Copying	\$1,500		Equip/Suppl /Mat	Grant
Travel Stipends for Participants: 30 Tribes/\$200 per	\$6,000		Travel	Grant
Travel for Executive Director: Lodging and POV Mileage, 1-day per diem (1-day meals provided)	\$500		Travel	Grant
Other	\$0	\$0	Leveraged	Sponsor
TOTAL	\$21,000	\$2,884		



PCEF DOES NOT REQUIRE THIS LEVEL OF DETAIL ON THE APPLICATION – For the Narrative and Budget development process it helps to map out as much detail as possible

SUMMARY OF THE PROJECT PROPOSAL PROCESS

NARRATIVE

PCEF APPLICATION QUESTIONS

Planning Project

Small Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Project 4: Environmental Benefits
- Section 5: Social Benefits
- Section 6: Workforce and contractor benefits

Large Project

- Section 1: Applicant Eligibility
- Section 2: Organizational Information and Financials
- Section 3: Project Description and Scope and Project Team Experience/Qualifications
- Section 4: Environmental Benefits
- Section 5: Social Benefits
- Section 6: Workforce and contractor benefits – Construction related questions
- Section 7: Budget*

Final PCEF Narrative File

BUDGET

EXAMPLE – Tribal Housing Energy Efficiency Training Series Sugsamish, WA

Task Budget Item	Estimated	Actual	Prog. Category	Prog. Source
Personnel: Executive Director hours	\$1,550		Personnel	Grant
Contractor: Training Team	\$5,000		Contract	Grant
Vendor: Clearwater Resort	\$3,000	\$2,884	Lev. Svc	Sponsor: Trib
Food & Catering: Clearwater Resort	\$3,000		Contract	Grant
Audio Visual: Clearwater Resort	\$450		Svc	Grant
Training Materials: Vendor 1 Event Printing:	\$1,500		Equip/Suppl	Grant
Vendor 2 Materials, Vendor 3 Copying			/Mat	
Travel Stipends for Participants: 30 Tribes/\$200 per	\$6,000		Travel	Grant
Travel for Executive Director: Lodging and POV				
Mileage, 1-day per diem (1-day meals)	\$500		Travel	Grant
Other	\$0	\$0	Leveraged	Sponsor
TOTAL	\$21,000	\$2,884		

PROJECT BUDGET TABLE				
	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.	Description
Personnel (staff of grantee agency only)	\$ -		\$ -	
Travel	\$ -		\$ -	
Equipment, supplies and materials	\$ -		\$ -	
Contracted work	\$ -		\$ -	
Other	\$ -		\$ -	
Expense category subtotals	\$ -		\$ -	
Overhead/admin				
Fiscal sponsor fee (if applicable)				
Percent total overhead/admin/fiscal sponsor fee		PDI/OI		<- If RED, adjust before submitting
PCEF project budget - subtotal	\$ -		\$ -	
Match funds/resources	\$ -		\$ -	
Total Project Cost	\$ -		\$ -	

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.

COMMUNITY IS KEY



THANK YOU!

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