

## Planning Grant Scoring Guidance

Planning grants will be scored on a 100-point scale, earning points for criteria which are grouped into four categories.

1. Organizational commitments and capacity – 30 possible points
2. Project description and scope - planning methodology – 40 possible points
3. Future project alignment with PCEF objectives – 20 possible points
4. Budget – 10 possible points

Within each category there are a number of criteria. Each criteria can be awarded up to a certain number of possible points. These are indicated in the column labeled "Possible points".

<b>Organizational commitments and capacity: 30 out of 100 points possible</b>				
Criteria	Possible points	Full points	Partial points	No points
Organization mission/purpose support PCEF goals of providing benefit to low income people, people of color, women, people with disabilities and people who are chronically underemployed.	3.0	Primary purpose of the applicant organization is to deliver programs that benefit the communities identified in this criteria. If the organization has a mission or statement of purpose, it must reflect focus on delivering benefits to communities identified in this criteria.	Organization delivers programs that benefit communities identified in this criteria, but it is not their primary purpose.	Organization purpose does not align with criteria.
Organization has demonstrated commitment to racial	4.5	Application must demonstrate that racial and social justice are the principles guiding decision making, planning and work of the	Organization has defined justice, equity, diversity, and inclusion as a priority and made	No evidence provided of commitment to

and social justice, diversity, equity, inclusion in service delivery and internal operations.		organization. The organization can demonstrate that commitment through work to address and correct historic discrimination. The organization articulates an understanding of the intersectional identities of the population(s) they serve. Trainings and educational opportunities related to justice, equity, diversity and inclusion that are offered or required for staff and/or board may also be used to demonstrate commitment but alone will not receive full points. Documentation may be provided but is not expected and will not be viewed as more valuable than description of values and/or work.	some progress at operationalizing these principles within the organization. Examples might include staff and/or board trainings that are offered and/or required. Planning documents or decisions that are guided by justice principles.	racial and social justice, diversity, equity and inclusion within organization.
Organization demonstrates strong understanding and practice around community engagement, particularly focused on historically marginalized and culturally diverse communities.	6.0	Application must include engagement practices clearly informed by principles of inclusion, co-creation, and collaboration, and reflect an understanding of the community the organization serves.	Focus of engagement is more on outreach and updates and not well informed by principles of inclusion, co-creation, and collaboration.	No evidence that organization understands or practices inclusive engagement.

Staff (including leadership) and board of the organization reflect the community their proposed project is intended to benefit.	4.5	The majority of staff, including leadership, and majority of board reflect the community the project is intended to serve.	At least thirty percent of staff leadership and thirty percent of the board reflect the community the project is intended to serve.	There is no representation in staff or board of the community project is intended to serve.
Application demonstrates organization's ability to manage funds responsibly and effectively.	6.0	Applicant organization must have a balanced budget, even if resilience is weak (e.g., few if any reserves, lack of contingency plan, lack of funding diversity). Organization must also have more than one person (staff and/or board) with financial controls and budget management responsibilities.	Budget may be imbalanced in most recent full year but explanation for deficit is reasonable and current year shows improvement. Description of budget management and financial controls practices is adequate. At least one staff (paid) or board member (volunteer or paid) is responsible for budget management and financial reporting.	Description of budget management and financial controls is unclear or incomplete. Budget is not balanced and no evidence of improvement or reasonable explanation of deficits.
Project team (including non-profit staff, contractors, and other partners) have relevant experience.	3.0	The project team members that have been identified have experience successfully implementing projects that share common characteristics to the proposed project. If applicable, application includes plan to secure additional project team members with appropriate experience.	Project team members that have been identified have worked on projects that, while they may not share common characteristics, have prepared them to be successful implementing the proposed project. If applicable,	No experience or plan to secure experience provided.

			application includes plan to secure additional project team members with appropriate experience.	
Applicant is a small or emerging organization.	4.5	Points awarded to organizations that have fewer than 10 full time equivalent (FTE) employees or have been in operation for fewer than three years.		

<b>Project description and scope - planning methodology: 40 out of 100 points possible</b>				
Criteria	Possible points	Full points	Partial points	No points
Opportunity statement and goal of planning is clear and compelling.	12.0	It is clear from the opportunity statement that the applicant has a firm understanding of the issue they intend to address. Intended beneficiary groups of the future project are identified. Impacts of issue to be addressed are understood.	Opportunity statement is understandable. Some questions remain.	Incomplete, not clear what issue or opportunity the application is hoping to address.
Scope of planning process is well designed - activities, research, analysis, etc.	12.0	Objectives are clear, applicant staff and other partners who will play key roles in planning process have been identified and are inclusive. Research needs have been identified/described and a sound methodology established. Potential barriers have been identified and a plan to mitigate is included. Consideration of potential displacement is included.	Scope provides a clear understanding of the stakeholders who should be included in the planning process and provides a general outline of how engagement will occur. Scope identifies some questions to be answered but not the method to finding the answers. Sequencing of activities lacks detail.	Scope has not identified any partners, stakeholders, activities, research or needed analysis.

		Sequencing of activities is detailed and makes sense.		
Engagement plan is inclusive, culturally appropriate, and well developed.	8.0	List of stakeholders whose input is required is complete. Modes for reaching them is designed in a way that is creative, culturally appropriate, and inclusive. Modes demonstrate that removing barriers to true engagement is a primary focus in planning activities.	Engagement plan offers standard traditional opportunities for stakeholder engagement (e.g. public meetings, surveys). Translation services are offered as requested.	No engagement opportunities.
Planning project timeline is reasonable.	4.0	Timeline is reasonable and has allowances for delays, both internal and external, that can be accommodated without impacting success of project.	Timeline appears reasonable but does not accommodate delays, either internal or external caused.	Timeline is not reasonable and likely to create problems for the proposed project.
Planning project management plan is clear and appropriate to the project.	4.0	Application provides clear plan for managing timeline, deliverables, communication, roles and responsibilities with internal staff, partners, contractors and other stakeholders working on the project.	Primary planning project manager has been identified and systems are in place to support accountability.	No plan.

**Future project alignment with PCEF objectives: 20 out of 100 points possible**

Criteria	Possible points	Full points	Partial points	No points
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Planned project alignment with PCEF objectives.	20.0	Planned project is in strong alignment with both climate and social justice program objectives.	Planned project meets only some PCEF objectives (e.g. reduces GHG but social justice alignment is not strong)	There is not clear alignment between planned project and PCEF objectives.
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<b>Budget: 10 out of 100 points possible</b>				
Criteria	Possible points	Full points	Partial points	No points
Project budget complete and reasonable.	10.0	Budget is complete, clear, and appropriately scaled to the proposed project.	Budget is complete but would benefit from modification/right sizing to the proposed project.	Budget is not complete and/or is not appropriate to the proposed project (e.g., too large, too small, missing key items, including extraneous items).