

Planning Grant Application Questions

Section 1: Applicant eligibility

- 1.1 Name of the applicant organization. If your organization is doing business as (DBA) other names, also include those names. _____
- 1.2 PCEF planning grants are for projects that support both climate action and social justice within one of the categories of funding listed below. 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 (please explain): _____
- 1.3 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 (e.g., memorandum of understanding or other). <upload file>
 - No
- 1.4 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, provide fiscal sponsor's EIN: _____
- 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:
- i. Name: _____
 - ii. Title: _____
 - iii. Email: _____
 - iv. Phone: _____
- 1.8 Amount of grant request \$_____.
- 1.9 Timeframe for grant implementation _____
- If longer than one year, please provide explanation_____.

- 1.10 Do all three of the following apply to applicant organization or fiscal sponsor?
- i. Organization (or fiscal sponsor) is IRS tax exempt.
 - ii. Organization (or fiscal sponsor) is an active registered nonprofit with the State of Oregon.
 - iii. Organization (or fiscal sponsor) is not on the Disqualified Charities list with the Oregon Department of Justice.
- Yes
- No – Stop. The organization is not eligible to apply for PCEF funding.
- 1.11 How long has your organization been a registered nonprofit with the State of Oregon? (if applicable) _____
- 1.12 Does your organization have, or plan to acquire, necessary and appropriate insurance for this project? If you are applying through a fiscal sponsor, please answer on behalf of the fiscal sponsor. (Note that some insurance costs can be an eligible grant expense.)
- Yes
- No – Stop. This project is not eligible for PCEF funding.
- 1.13 Are there any tax liens on your organization and/or the fiscal sponsor?
- Yes – Stop. This project is not eligible for PCEF funding
- No
- 1.14 Does the project being planned include any physical improvements (e.g., tree/garden/farm, efficiency retrofits, solar/other renewable installations)?
- Yes
- No – Skip to number 12 below.
- 1.15 Will the proposed physical improvement and the populations who will benefit from the project be located within the City of Portland?
- Yes
- No – Stop. This project is not eligible for PCEF funding.
- 1.16 Is the planning grant for a project or program that does not include any physical improvements (e.g., workforce development)?
- Yes
- No – Skip to number 13 below.
- 1.17 Will the project or program that is being planned serve people who reside in Portland?
- Yes
- No - Stop. This project is not eligible for PCEF funding.
- 1.18 Required Signature: The undersigned certifies that the information provided herein, to the best of their knowledge, is true, complete, and accurately describes the proposal. Include the signature in the blank box.

Section 2: Organizational Information

This section collects information about your organization's history and ability to successfully perform the proposed planning project. All questions in this section apply only to the applicant organization. Do not include information about project partners or contractors; that information is included elsewhere. If the application is being submitted with a fiscal sponsor, answer the questions from the perspective of the organization proposing to do the work and *not* from the perspective of the fiscal sponsor, unless specifically asked to do so.

- 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 and continue to question 2.5. Do NOT include contractors and people employed to work on the project; they are addressed in another section. (50 to 100 words)
 - 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 Complete the information below about your **board and staff makeup** of priority populations identified above. We know this list is not comprehensive and that people may have additional identities not included here. Please complete to the best of your organization's knowledge, based either on estimates made by the organization, by individuals self-reporting, or a combination of the two.

This question allows you to count people in more than one category (e.g., a person may be a woman and a person with a disability). Please indicate whether the information you enter is self-identified (you collected information directly from staff/board) or estimated (you did not collect information directly from staff/board), or a combination of the two sources.

- a. **Board of Directors.** Total number of board members _____
 1. Number of people of color _____
 2. Number of women _____
 3. Number of people with disabilities _____
 4. Number of people currently or have previously experienced low income _____
 5. Number of people currently or previously chronically underemployed _____
 6. Number of people NOT included in any of the categories listed above* _____

7. How was information collected:
 - Self reported (information was provided by individuals; for example, in an application or survey).
 - Estimated (you are making an educated guess about individuals' identities).
 - Combination of estimated and self reported.
- b. **Paid staff:** Total number of paid staff, both full time and part time _____
 1. Number of people of color _____
 2. Number of women _____
 3. Number of people with disabilities _____
 4. Number of people currently or have previously experienced low income _____
 5. Number of people currently or previously chronically underemployed _____
 6. Number of people NOT included in any of the categories listed above* _____
 7. How was information collected:
 - Self reported (information was provided by individuals; for example, in an application or survey)
 - Estimated (you are making an educated guess about individuals' identities).
 - Combination of estimated and self reported
- c. **Staff leadership:** Staff leadership includes the executive director and other staff who are in a role where they make strategic decisions for the organization. Note that staff leadership is also represented in the total staff numbers that were reported in the previous question (2.5.b). Total number of staff leadership _____
 1. Number of people of color _____
 2. Number of women _____
 3. Number of people with disabilities _____
 4. Number of people currently or who have life experience being low income _____
 5. Number of people currently or who have life experience being chronically underemployed _____
 6. Number of people NOT included in any of the categories listed above* _____
 7. How was information collected:
 - Self-reported (information was provided by individuals; for example, in an application or survey)
 - Estimated (you are making an educated guess about individuals' identities)
 - Combination of estimated and self-reported

* Please enter the number of your staff, staff leadership, and board that do NOT identify as people of color, women, people with disabilities, people who are (or have life experience) of being chronically underemployed or with low incomes. This information is needed to determine total representation of your board and staff.

2.6 The PCEF priority populations reported above are in broad categories. Please give us a little more detail about how your organization's staff, leadership, and board reflect the specific population the project is designed to benefit. For example, if your project is targeting Latinx people for a pre-

apprentice program, how does your staff, leadership, and board reflect the Latinx community? (100 to 250 words)

Financials

If you are submitting this application with a fiscal sponsor, question 2.8 applies to the fiscal sponsor. If your organization is new and does not have financial records, please make a note of that. It will not impact how your application is scored.

- 2.7 Describe how your organization will manage and account for grant funds. If you are applying with a fiscal sponsor, provide a description of the agreements about budget management and financial controls between the applicant organization and the fiscal sponsor, including roles and responsibilities. If you already have a written agreement with your fiscal sponsor you can attach the agreement instead of writing the narrative description. <upload file field> (100 to 200 words)
- 2.8 Submit the following financial documents:
- Current board-approved operating budget <upload file field>
 - Most recent full year financial statement (audited financials if available) <upload file field>

Section 3: Project Description and Scope

This section of the application asks for information about the proposed planning project, including the project team, scope of work, benefits, and budget.

- 3.1 Planning project opportunity or problem statement, including elements below: (300 to 700 words)
- Tell us why you want to do this planning project. 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?
 - How will the planning project address climate change as well as advance racial and social justice?
- 3.2 Planning process: (500 to 1,000 words)
- Scope
 - Timeline: What is the proposed start date and end date for this planning grant?

 - What will the outcome or result of this planning grant be?
 - Describe the planning process (tell us what you are going to do) and how it advances racial and social justice. Include a description of any known partners as well as any known activities, including research, technical/professional consultation, meetings and events, community engagement, etc.
 - What are the known potential challenges to the success of the proposed planning process and how will you address them?

Project team experience and qualifications

- 3.3 Describe how the professional and life experience of the project team will help the proposed planning process be successful. Team members include people from your organization and any other

partners or contractors who have already been identified. If you haven't identified all of the members of your project team, describe how you will make sure the final team includes the experience and qualifications needed. (150 to 350 words)

- 3.4 Provide bios (one to two paragraphs) for each of the following: 1) primary people from the applicant organization who will be working on the proposed planning project; and 2) contractors and partners (if already identified).

Project Budget

- B.1. Complete budget template (see Budget template).

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