

Environmental Justice Project Measurement and Evaluation Framework

Guidance

This guide clarifies the criteria and definitions included in the Environmental Justice Project Measurement and Evaluation Framework (EJ MEF). Project evaluators should refer to this guide during the review of project proposals.

Acknowledgements

This tool was developed as a collaboration between the members of the Just Transition PowerForce, Microsoft CO+I, and WSP USA. It is based on the Portland Clean Energy Community Benefits Fund granting process and the Energy Democracy Flipbook, a project facilitated by Emerald Cities Collaborative and the US network of energy democracy practitioners.

The Just Transition PowerForce is an advisory committee of US-based environmental and climate justice organizations working together to ensure a transition to a clean energy and regenerative economy that is led by and prioritizes low-income and communities of color on the front lines of the climate crisis. The PowerForce was established in 2021 to align the climate commitments of corporations toward deep investments in the sustainability and climate resilience of frontline communities, enabling self-determination, economic security, and restorative and transformative justice.

The Portland Clean Energy Community Benefits Fund (PCEF) is a City of Portland program that provides dedicated funding to take climate action and advance racial and social justice. Approved by Portland voters in 2018, PCEF is the first program of its kind in the US, investing in green jobs, healthy homes and communities, and a climate-friendly Portland.

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Intentions and criteria for evaluators

Evaluating project concepts for environmental justice outcomes requires thoughtful consideration of complex and highly localized social histories and dynamics. For this reason, users of this framework should be mindful of the US-centric context in which it was developed, and embrace the work necessary to become an effective user of this tool.

A message from the Just Transition PowerForce

Because each of us is socialized in different ways based on our race, gender, class, and other identities, it is impossible to be an unbiased evaluator, particularly when evaluating for environmental justice. This tool, developed by Black, Indigenous, and People of Color environmental justice leaders and organizers, and with the support of white collaborators, is imperfect, evolving over time, and rooted in the lived experiences of people and communities that have been most impacted by environmental injustice and most excluded from access to resources and decision-making authority. For these reasons, it is critical to thoughtfully consider who is best suited to interpret this framework and guidance.

The work around environmental justice is specific to localities, impacted parties, proposed projects, and intended outcomes, which makes it impractical and ill-advised to use this tool as a universal standard or procedure without tailoring and critical interpretation with local frontline community experts. Users of this tool should endeavor to consume the framework, guidance, and linked resources in their entirety to glean overarching themes, intentions, and a deeper understanding of the complexities they will need to navigate to adeptly engage in environmental justice.

All people are on a journey of understanding systemic oppression and unlearning oppressive ways of thinking and being; transformation is always possible. Individuals who hold dominant and privileged identities as it relates to race, color, gender, sexual orientation, ability, class, age, ethnicity, etc., and who hold positions of formal power, are encouraged to step back from serving in an evaluator role. We caution users against performative actions and misrepresentations related to this tool (that is, engagement with this content does not fundamentally equate to expertise or authority in environmental justice). Evaluators and other decision-makers using this tool to steward a funding or project selection process should identify as members of frontline communities or other groups experiencing oppression. This is not a positioning tool to legitimize an inequitable funding or project selection process.

An equitable funding and project selection process includes:

- Maximum transparency, including the source of capital, governance, process expectations, and constraints.
- Co-learning, co-creation, and consensus about the design and implementation of a funding or project selection process by and with frontline community members.
- Self-determination, leadership by, and decision-making autonomy for frontline communities.

Note of gratitude

Our gratitude is extended to the NAACP Centering Equity in the Sustainable Building Sector network and the co-authors and editors of their [Guidelines for Equitable Community Involvement in Building and Development Projects and Policies](#), which informed this section of guidance.

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- Adaptive approach to pivot and learn along the way, including an exploratory process to continuously push boundaries to take bold, courageous, and transformational steps.
 - Acknowledgment and reversal of status quo white supremacist and capitalistic evaluation approaches,¹ instead favoring advancing deeply regenerative and democratic organizations and communities.
 - Consideration for the unique circumstances of the cases to which this framework and guidance is applied.
 - An ecosystem of support beyond funding (and beyond funding from a single donor) for frontline communities.
 - An expectation that mistakes are inevitable, and mechanisms are in place to ensure accountability from funders and decision-makers to transform conflicts and share learnings with the broader environmental justice movement.

When used thoughtfully, this tool can support advocacy for and produce policies, programs, and practices that are transformational for individuals, economies, and society—advancing a [just transition](#) for all of us.

Example Readiness Projects

Readiness projects prepare under-resourced communities to participate in or lead clean energy, sustainability, and resilience efforts. Examples include workforce training; K-12 or higher education programming and scholarships; and capacity-building grades to frontline NGOs or community-serving organizations engaging in policy, advocacy, or planning for transformation of physical assets in their communities. Budgets for readiness projects are typically focused on covering salaries and wages, consulting fees, or stipends for participants; non-labor costs are usually focused on supplies or equipment needed for experiential learning.

Projects that encompass both readiness and small physical assets components should be evaluated based on whichever component comprises the majority of the project budget.

¹ Additional resources for white people [here](#) and [here](#).

Glossary

TERM	DEFINITION
BIPOC	Black, Indigenous, and People of Color.
Community-serving organization (CSO)	<p>CSOs are those with a mission specifically dedicated to a community defined by place (neighborhood, municipality) or population (for example, frontline identities, people of color, people who are low income, people with disabilities, people who are children, older adults, people who are LGBTQIA,² and people who identify as women). CSOs include social service agencies, nongovernmental organizations (NGOs), and formal and informal community groups, such as neighborhood associations or special-interest clubs. For-profit entities are excluded for the purposes of this framework. Ideally, CSOs are physically based in the communities they serve, though in some cases CSOs can be effective even without a physical presence.</p>
Cooperative ownership	An ownership and governance model in which jointly owned enterprises are controlled through democratic governance to realize the economic, social, and cultural needs of their owner members.
Direct benefits	<p>Benefits that improve the quality of life for a community in a tangible and measurable way in a discrete time period. The benefits reflect community priorities for addressing the barriers the community has communicated. This contrasts with indirect benefits, which do not address root causes or change material conditions for individuals and are difficult to assess or measure.</p> <p>A direct benefit from a project could include job creation or the transfer of assets, such as solar panels, to a priority community. In this instance, there are no degrees of separation between the priority population and the directly delivered benefits. An example of an indirect benefit is an energy efficiency project that generates cost savings for an entire school district that serves a mixed population of students. Though the district may in turn use the savings to support students within the priority population, that is not a direct and absolute result of the efficiency investment.</p>
Diverse-owned (business)	Ownership by individuals that identify with the priority population (defined below). Different locations may define priority populations differently, though generally they will include marginalized, under-resourced, and

² LGBTQIA is defined as lesbian, gay, bisexual, transgender, queer/questioning (one's sexual or gender identity), intersex, and asexual/aromantic/agender.

vulnerable individuals and communities, such as BIPOC-owned businesses in the United States.

A diverse-owned business meets one of the following:

- A sole proprietorship, owned and controlled by a member of the priority population.
- A partnership or joint venture of business enterprises in which 51 percent of the beneficial ownership interest is held by members of the priority population.
- A corporation or other entity controlled by persons in which at least 51 percent of the voting interest and 51 percent of the beneficial ownership interest are held by members of the priority population.

In the United States, consult local, state, or national databases and certification programs for business enterprises certified as diverse-owned.

Energy democracy

An approach to the renewable energy transition that seeks to strengthen communities by advancing both new technologies and new values within the energy sector, with the intent to protect workers, the environment, and fair access to energy resources. The values of the energy democracy movement include the integration of social justice; adopting new cooperative economic models and governing institutions; and prioritizing community health, resilience, and the environment over property rights. Energy democracy advocates focus on advancing decentralized energy systems, such as community-owned distributed solar generation, and ensuring the burden of electrification and the clean energy transition do not fall on the poorest.

Environmental justice

The fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. This goal will be achieved when everyone enjoys the same degree of protection from environmental and health hazards and equal access to the decision-making process to have a healthy environment in which to live, learn, and work.³

Environmental justice begins with acknowledging past and present harms to communities of color, low-income communities, and other communities on the frontlines of the climate crisis and racial and economic injustice. It redirects leadership, resources, and decision-making into these communities that are most impacted and were previously excluded.

³ "Environmental Justice," The U.S. Environmental Protection Agency, accessed September 28, 2021, <https://www.epa.gov/environmentaljustice>.

<p>Frontline communities</p>	<p>The populations most impacted by multiple and cumulative sources of pollution and climate impacts due to proximity to toxic factories, fossil fuel refineries, neighborhood oil drilling, freeways, and the like, often without access to clean drinking water or public investment.</p> <p>People who experience oppression because of race, income, gender, sexual orientation, disability, gender identity, age, etc. are more likely to have less resources and protections in society in general and even less access to resources and protections not only to adapt to our changing climate but also to pass policies and legislation that are fair and culturally significant.⁴</p>
<p>High-road labor standard</p>	<p>High-road labor standards include the following:⁵</p> <ul style="list-style-type: none"> • Job quality – At a minimum, quality jobs include family-supporting wages, benefits, safe working conditions, fair scheduling practices, and transparent career advancement opportunities. • Worker voice – Recognize workers’ experience and knowledge to inform job structures, descriptions, and quality. Leverage workers’ perspectives to assess workforce gaps, such as: <ul style="list-style-type: none"> ○ Addressing expected changes resulting from technological evolution and deployment. ○ Maintaining or increasing competitiveness in anticipation of, or in response to, market forces like new laws and regulations. ○ Informing career advancement needs and opportunities. • Equity – Take a systematic approach to generating greater opportunity for individuals who have been left out of the mainstream economy, are under-represented in high-wage occupations and industries, or face multiple barriers to quality in employment. <p>Environmental sustainability – Address issues related to environmental sustainability, particularly climate change.</p>
<p>Intersectionality</p>	<p>The complex, cumulative ways in which the effects of multiple forms of discrimination (such as racism, sexism, and classism) combine, overlap, or intersect, especially in the experiences of marginalized individuals or groups.⁶</p>

⁴ “Our Communities, Our Power: Advancing Resistance and Resilience in Climate Change Adaptation,” NAACP, accessed September 28, 2021, <https://naacp.org/know-issues/environmental-climate-justice>.

⁵ “What Is A High Road Labor Standard?” Gridworks, accessed September 28, 2021, <https://gridworks.org/2021/04/what-is-a-high-road-labor-standard/>.

⁶ Crenshaw, Kimberle. “Mapping the Margins: Intersectionality, Identity Politics, and Violence against Women of Color.” *Stanford Law Review* 43, no. 6 (1991): 1241–99. <https://doi.org/10.2307/1229039>.

Just Transition	Just Transition is a vision-led, unifying, and place-based set of principles, processes, and practices that build economic and political power to shift from an extractive economy to a regenerative economy. ⁷
Labor hours	Labor hours include the total hours of workers receiving an hourly wage who are directly employed on the site of the project to complete physical work. Labor hours include hours worked by all craft workers, including working foreman, lead (journeymen, working owner-operators (allowing for small businesses) and apprentices, and shall not be supervisory, management or non-working owners.
Local hiring and procurement	Local hiring and procurement programs use geographically targeted hiring programs that connect local workers and businesses, especially in under-resourced communities and priority populations, to jobs and business opportunities. The targeted populations may be based on geographic, income, minority, veteran, or other status indicative of economic marginalization. This benefits local contractors and workers, including diverse-owned businesses historically excluded from contracting opportunities.
Living wage	A wage that is adequate to maintain a satisfactory standard of living and that allows individuals and families to afford shelter, food, and other necessities.
Marginalized populations	People who are denied involvement in mainstream economic, political, cultural, and social activities and exist on the margins of society. Factors contributing to marginalization include, but are not limited to, age, physical or mental abilities, economic status, race or ethnicity, and access to education.
Priority populations	The individuals and communities intended as the primary beneficiaries of environmental and climate justice initiatives. Different locations may define priority populations differently, though generally they will include marginalized, under-resourced, and vulnerable individuals and communities. Consider intersectionality as a factor in determining priority.
Project leads	Organizations included in the core project team with overall decision-making authority for project planning and implementation. This excludes project funders without a significant advisory or implementation role and

⁷ "Just Transition: A Framework for Change," Climate Justice Alliance, accessed September 28, 2021, <https://climatejusticealliance.org/just-transition/>.

project partners that deliver key elements of the project but do not have overall decision-making authority.

Project partner or partner organizations	A project proposal may include individuals or teams from multiple organizations, including a combination of for-profit and nonprofit entities, referred to as “partners” or “partner organizations.” For evaluating purposes, the key partners to consider are those in lead roles, as well as any other partners that are materially involved in the project design and implementation, such as project management, training, community involvement, procurement, and other forms of project implementation. Project advisors or organizations with minor roles (for example, less than 10 percent of the labor effort) are not considered key partners).
Project team	The group of individuals responsible for implementing the project, including community members, staff of organizations participating in the project, contractors, and other partners.
Real assets	Physical assets such as commodities, real estate, land, equipment, and natural resources.
Resilience	The capacity of a system (this could be a community, an economy, etc.) to maintain an intact core identity in the face of change. Also, a state of dynamic balance within which change can be avoided or recovered from without a fundamental transition to a new form. ⁸
Small or emerging business	Small or emerging businesses are those that carry a local, state, or national certification based on revenue or employee standards relevant to the related industry or have fewer than six fulltime equivalent employees or have been in operation for fewer than three years.
Staff leadership	Individuals in senior management, executive management, upper management, or a management team at the highest level of management and authority within an organization who have the day-to-day tasks of managing that organization.
Under-resourced communities	Communities with high proportions of low- and middle-income residents and generally receive below-average quality and amount of services and financial resources from government and the private sector. In the United

⁸ “Our Communities, Our Power: Advancing Resistance and Resilience in Climate Change Adaptation,” NAACP, accessed September 28, 2021, <https://naacp.org/known-issues/environmental-climate-justice>.

States, an above average number of people of color and immigrants compose under-resourced communities.⁹

Vulnerable populations

Often used synonymously with “frontline communities,” “under-resourced communities,” or “marginalized populations.” Populations including low-income communities, older adults, children, and health-compromised individuals of any race or socioeconomic status that are especially harmed by climate impacts. Due to a lack of resources or presence of biological sensitivities, these populations are more at risk of experiencing adverse effects from climate impacts.

⁹ “Solar with Justice Report,” Clean Energy States Alliance (CESA), accessed September 28, 2021, <https://www.cesa.org/wp-content/uploads/Solar-with-Justice.pdf>.

Prerequisite criteria

ITEM	CRITERIA	GUIDANCE
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1 Project intends to provide benefits to priority populations, such as under-resourced, marginalized, and frontline populations

DESIRED OUTCOME

Ensure that the project is deliberate in delivering benefits to the intended populations.

CONSIDERATIONS

- Evaluating this prerequisite requires determining whether the intended project benefits are direct and whether they are targeted at priority populations.
- If the project is directed at a general or broad population, it may not be enough to serve environmental justice objectives.
- To evaluate directness of benefits, consider the following:
 - Are the intended benefits aligned with demonstrated prioritized needs of the priority population?
 - Will the benefits logically affect the target community within 6 to 12 months of project completion (or the timeline otherwise anticipated by the project team)?
 - Is there a reasonable way to measure the benefit to individuals or households?
 - Are there many conditional circumstances necessary for the priority population to experience the benefits?

RESOURCES AND EXAMPLES

- **Glossary** definition of priority populations.
- **Glossary** definition of under-resourced communities.
- **Glossary** definition of marginalized populations.
- **Glossary** definition of frontline populations.
- **Glossary** definition of direct benefits.

Example – targeted benefits: If a project benefiting a local school has a higher proportion of affluent students than the general public, the prerequisite would not be satisfied, even if some students are in the priority population. If the school has a higher proportion of prioritized students than the general public or is in a location with high needs across communities, the prerequisite would be satisfied.

Example – direct versus indirect benefits: A direct benefit from a project could include job creation or the transfer of assets, such as solar panels, to a priority community. In this instance, there are no degrees of separation between the priority population and the directly delivered benefits. An example of an indirect benefit is an energy efficiency project that generates cost savings for an entire school district that serves a mixed population of students. Though the district may in turn

use the savings to support students within the priority population, that is not a direct and given result of the efficiency investment.

2

Project planning and decision-making involves, at a minimum, community perspectives and leaders

DESIRED OUTCOME

Ensure community needs and assets are integrated into the project and inform planning.

CONSIDERATIONS

- To determine whether the project meets this requirement, refer to the infographic in [Appendix A](#), excerpted from Facilitating Power’s [Spectrum of Community Engagement to Ownership](#).
- Level 3 (Involve) is the minimum to satisfy the prerequisite, and projects that follow best practices beyond this minimum are scored more favorable in the scoring rubric.
- In assessing this prerequisite, consider:
 - Does the proposal mention “community outreach” or an “organizer” role?
 - What formal role do local organizations and frontline community members play in the proposal? Do they have significant budget allocated to support ongoing involvement?
 - Is there testimony or verification available from members of the priority populations most impacted by the project to confirm their level of involvement?
 - Locally owned or based business and organizations (including governmental) do not automatically represent perspectives of priority populations.

RESOURCES AND EXAMPLES

Appendix A: The Spectrum of Community Engagement to Ownership.

3

Labor needed for the project is compensated at least at living wage levels for a sole adult

DESIRED OUTCOME

Ensure the project does not rely on unfair labor practices.

CONSIDERATIONS

- Projects that are committed to paying wages at the levels negotiated through collective bargaining, unions, or collaborative procurement efforts are considered living wages.
- To determine whether the project relies extensively on volunteer contributions from under-resourced community members, review the project proposal for mentions of labor practices and the websites or annual reports of the involved organizations.

- This requirement is not meant to exclude voluntary, self-determined unpaid contributions from board or chapter members of nonprofit organizations.
- Outside of the previous consideration regarding nonprofit board and chapter members, unpaid internships, or underpaid labor by members of the priority population for significant aspects of project implementation is considered noncompliant; proposals should instead include budget items to compensate this labor.
- To determine living wages for locations in the United States that comply with this prerequisite, consult the living wage for households with a sole adult in the [MIT Living Wage Calculator \(US\)](#). In the United States, minimum wage does not necessarily mean a living wage.

RESOURCES AND EXAMPLES

Glossary definition of living wage.

4

Medium-sized or larger for-profit partners have public carbon neutrality and clean energy transition commitments or an aligned core business

DESIRED OUTCOME

Ensure that project partners are committed to preventing further human health and climate impacts from industrial pollution through the disclosure of their emissions and meaningful participation in the clean energy transition.

CONSIDERATIONS

- A for-profit entity is considered medium-sized or larger if they employ 100 or more employees or received \$50 million or more in annual revenue. These criteria do not apply to small for-profit entities.
- A project proposal may include individuals or teams from multiple organizations, including a combination of for-profit and nonprofit entities.
 - If medium-sized or larger for-profit entities are involved, evaluate the one or more entities with the largest budget portions that comprise at least 50 percent of the budget for for-profit partners.
 - Projects delivered exclusively by nonprofit entities and fully member- or worker-owned cooperatives earn full credit.
- Aligned core businesses include businesses that provide goods and services related to the carbon solutions listed in the "Appendix-Climate Benefits" tab within the scorecard file. Companies that simultaneously deliver goods and services related to the fossil fuel energy sector are not considered to have an aligned core business, even if they also have clean energy goods and service offerings.

- If the project proposal does not readily provide information pertaining to carbon neutrality and clean energy commitments, use internet research to locate relevant information, such as:
 - Annual sustainability reports or statements posted on the organization’s website.
 - [CDP reporting.](#)
 - [Science-based target commitments.](#)
 - [RE100 commitments.](#)

RESOURCES AND EXAMPLES:

- **Glossary** definition of partner.
- “Appendix-Climate Benefits” tab within scorecard file.

Example – multiple for-profit partners: If a project proposal consists of two medium-sized for-profit companies with a collective budget of \$100,000, with 75 percent of that budget apportioned to Company A and 25 percent to Company B, only Company A needs to be evaluated for prerequisite compliance.

Example – multiple for-profit partners: If a project proposal consists of three medium-sized for-profit entities with a collective budget of \$100,000, with 40 percent of that budget apportioned to Company A, 40 percent to Company B, and 20 percent to Company C, both Company A and B need to be evaluated for prerequisite compliance because they are entities with the largest budget proportions and together account for at least 50 percent of the for-profit budget.

5 Project outcomes include climate benefits

DESIRED OUTCOME:

Ensure that the root causes and effects of the climate crisis are addressed.

CONSIDERATIONS:

- A project proposal must include at least one aspect related to the prevention or mitigation of greenhouse gases (GHGs) and their copollutants, either directly or through efforts to transform the policies or social structures that contribute to the climate crises. GHGs include carbon dioxide, methane, nitrous oxide, and fluorinated gases. Copollutants include particulate matter, nitrogen oxides, sulfur oxides, volatile organic compounds, and other air toxins released during the combustion of fossil fuels.
- Project proposals are not required to show project-specific GHG emissions reduction or sequestration benefits if they are related to the high and regular priority carbon drawdown solutions listed in the “Appendix-Climate Benefits” tab of the scorecard; if a proposal contains climate-related approaches

outside of those listed, use internet research to evaluate the approach to addressing pollutants of concern or achieving transformation of the root causes of climate change. Evaluate the solution for compatibility with environmental justice outcomes and community priorities, including the potential for the proposed solution to have adverse impacts even if carbon reductions may be achieved, as in the case with approaches that exploit land, labor, and living systems.

- The solutions listed in the Appendix-Climate Benefits worksheet are derived from the Project Drawdown list of top carbon reduction opportunities, and have been intentionally narrowed by the Just Transition PowerForce from the full Project Drawdown list to focus on those solutions that are the highest priority and recommended solutions because of their alignment with environmental justice outcomes. These include solutions that do have the support of the local community, do not perpetuate the use of fossil fuels as an energy source, do not have significant local pollution impacts, and do not develop new industries reliant on extractive consumerism.
 - Identify the carbon solutions represented within the project proposal and map them to the solutions listed in the Appendix-Climate Benefits tab. Filter first by primary category (e.g., Food and Agriculture), and then look for the specific solutions (e.g., Reduced Food Waste). For prerequisite purposes, projects related to any listed solution are compliant unless there is unified community opposition to that solution locally; the priority levels listed in Column G are for full project scoring only.
 - Apply a national/regional/local lens to ensure appropriateness of the carbon solution(s), particularly for the following solutions:
 - Refrigerant management - Frontline communities should be equipped to mitigate harm from emissions and pollution already impacting their communities. However, a mitigation strategy in and of itself should not cause harm. Project Drawdown suggests that Refrigerant Management can include purification for reuse or transformation into other chemicals that do not cause warming. Communities and evaluators should look at the whole life cycle of any proposed harm reduction measure, to the greatest extent possible, to ensure that this strategy does not

-
- reduce emissions at the expense of community health.
 - Clean cookstoves - Given that Project Drawdown promotes this as a solution for only certain geographies in the Global South, including countries with lower incomes economies located in Asia, Africa, Latin America, and the Caribbean, and the US-centric context in which this framework was developed, evaluators should defer to the perspectives of local frontline communities when evaluating project proposals related to this solution.
 - Projects that set the stage for eventual implementation of a qualifying carbon solution satisfies the prerequisite criteria.
 - Some projects that reduce emissions or sequester carbon do not ultimately deliver climate benefits, or can at the same time continue or cause new harm to communities and ecosystems. For example, waste-to-energy processes that combust waste and convert it to heat or electricity may reduce emissions if replacing energy that would otherwise be generated by combusting coal or gas, but come with serious human health and environmental risks, and can undermine waste prevention strategies. These types of strategies do not support environmental justice outcomes and are not aligned with Just Transition principles.
 - Evaluate the carbon solutions represented within the project proposal in the context of environmental justice outcomes and Just Transition principles.
 - Qualifying solutions do not exploit land, labor, or living systems, and instead promote fair economic inclusion, energy democracy, food and land sovereignty, and protection of nature.
 - If local leaders of frontline communities and priority populations collectively oppose certain climate solutions, related projects are not considered compliant with this prerequisite; if there is some opposition because the proposed solution has the potential for adverse effects on communities or the environment, the project proposal must include a viable plan for addressing those risks to be considered compliant with this prerequisite.

RESOURCES AND EXAMPLES

- The "Appendix-Climate Benefits" tab within scorecard file.

- Project Drawdown Solutions [website](#).
- [Hoodwinked in the Hothouse](#).
- [The People’s Solution Lens](#).

Example – project that can be improved to include climate

benefits: A capacity building grant is proposed by a nonprofit that helps community-serving organizations improve their facilities. The project proposal is for training facility operators to evaluate equipment upgrade opportunities, but does not indicate a plan to include decarbonization planning within the training, even though many opportunities for fuel switching or efficiency improvements are likely to exist. Therefore, the project does not deliver climate benefits. The proposal can be improved to satisfy the prerequisite by specifying that the training program includes content focused on evaluating for energy efficiency and electrification retrofits.

Example – solution that is not appropriate in all geographies: In relation to Bamboo Production, Project Drawdown notes, "Because bamboo is an invasive species in many places, which can spread with detrimental effects to native ecosystems, care should be taken to select appropriate locations and manage its growth." A project concept proposing this solution should address the appropriateness of the solution to the local context, and how potential adverse effects will be monitored and managed over time.

6

The project, if related to new development or major redevelopment, includes measures to prevent displacement

DESIRED OUTCOME

The project does not displace low-income residents by increasing housing costs and other living expenses.

CONSIDERATIONS:

- Evaluate the potential for displacement of low-income and under-resourced residents and the efficacy of mitigation strategies by asking:
 - Do low-income and under-resourced residents live in the immediate vicinity of the project site?
 - Are property values and taxes likely to increase as a result of this project?
 - Are other cost-of-living increases likely, such as increased food prices, rent, and parking?
- For the purposes of this prerequisite, building retrofits such as rooftop solar installations and equipment retrofits that improve building performance but do not change the fundamental use of the facility are not considered a displacement risk, and the prerequisite is considered "not applicable."
- For projects that carry risk of displacement, are there deliberate measures to mitigate impacts, and does the approach seem feasible and effective?

- Readiness projects focused on planning for new development or the transformation of existing physical assets in a manner that will change the fundamental use of the facility are those most likely to carry displacement risks.

RESOURCES AND EXAMPLES:

Example – preventing displacement: A community development corporation is seeking resources to conduct a planning study to evaluate development strategies for a vacant site located in a community with low-income renters and homeowners. Depending on the nature of the development, there is high potential to increase property values and cause displacement of long-time neighbors. To prevent this, the proposed study includes evaluating the risks of displacement for each development strategy and engaging community members in identifying the resources and protections they would need to mitigate those risks.

7

Project avoids development or disturbance of land that has been identified as culturally sensitive or ecologically important by community stakeholders

DESIRED OUTCOME

Ensure that project siting does not result in the destruction of sensitive land.

CONSIDERATIONS

- This prerequisite is considered “not applicable” to projects or project concepts that do not include development or disturbance of land. If land may be disturbed during the current or future phases of the project concept, evaluate for the potential that the affected land is inappropriate for development given cultural and ecological considerations.
- Regulatory and permitting processes evaluate or prohibit development on some sensitive sites but should not be considered the only criterion for meeting this prerequisite.
 - Opposition from community stakeholders due to cultural concerns is one indicator that this criterion has not been satisfied. Perform due diligence, including internet research (for example, review media coverage, public meeting records and comments, community advocate websites, and social media), to determine whether there is community opposition to this project.
- The timespan for determining impact should consider the short-term (1 to 12 months) and the long-term (1 to 30 years).

Readiness projects scorecard

Leading organizations

ITEM	CRITERIA	GUIDANCE
1	Project is led or co-led by CSO with an established relationship with the community the project is intended to benefit (priority population)	<p>DESIRED OUTCOME</p> <p>Project leads have a strong understanding of and commitment to the needs of the benefiting community.</p> <p>CONSIDERATIONS</p> <ul style="list-style-type: none">• Projects exclusively led by for-profit entities do not qualify for points; projects with at least one partner that meets the definition of a CSO that has an existing relationship to the intended community are eligible for points.• Prerequisite 2 addresses community involvement in a project in the shorter term, and this criterion addresses the holistic, long-term relationship of CSOs with their communities and whether they have a leadership role within the project (as opposed to other project partners not in a leadership position).• To determine whether the CSO has an established relationship with the intended community, review the organizational website or other materials for:<ul style="list-style-type: none">○ A description of the CSO’s mission or vision statement that demonstrates clear connection to the community.○ Evidence of positive interaction between the CSO and community members on social media or through other unpaid media coverage.○ Indications that the CSO’s employees, members, volunteers, committee, or board members live or work in the community.○ Past projects or collaborations with the community.• Consider the relationship length between the CSO and the community. Community-based organizations (CBOs) local to the community and led by community members are preferable to outside organizations. If an organization has a newly created position or department devoted to engaging the intended community but no actual track record or demonstrated outcomes, whereas other local groups have a long-standing track record, this criterion would not be met.• If the organization works in the community but has had negative impact or lacks the organization health needed for constructive community relationships, this criterion is not satisfied. Established policies for whistleblowing and conflict

resolution or positive testimonials from employees or collaborators are signals of organization health and strong community relationships.

- To determine whether the CSO has a leadership role in the project, evaluate the extent of their decision-making authority in the project planning and implementation.

RESOURCES AND EXAMPLES

- **Glossary** definition of priority population.
- **Glossary** definition of project leads.
- **Glossary** definition of CSO.
- **Glossary** definition of partner or partner organization.

2

CSO is genuinely involved and not in name only (tokenization)

DESIRED OUTCOME

CSOs involved in the project have an authentic and material role.

CONSIDERATIONS

- This criterion focuses on whether a CSO, as either a project lead or project partner, is materially involved; it is not necessary for the CSO to have a previous relationship with the community to be eligible for points for this item.
- Based on the project approach, is it clear the CSO will be performing, managing, delegating, or supervising functions that are critical to the project?
- Does the project align with the established capabilities and mission of the CSO, or address how capabilities will be expanded?
- Does the project approach indicate that the CSO's role pertains to 10 percent or more of the project budget?

RESOURCES AND EXAMPLES

- **Glossary** definition of project leads.
- **Glossary** definition of project partners or partner organizations.
- **Glossary** definition of CSO.

Example: A CSO is listed as one of five project partners, though the project approach does not list any employees of the CSO as key project personnel. Additionally, the CSO's role on the project is described as "ad hoc advisory support." In this case, there is no evidence that the CSO has a role that is material to the project and no points are awarded.

3

Project leads have a track record of delivering programs or projects that benefit the intended priority population

DESIRED OUTCOME

Project has high likelihood of delivering intended outcomes because the project leads are experienced in overcoming challenges specific to the project type.

CONSIDERATIONS

- Look for evidence that the leading organizations or key personnel for the project team have at least three years of experience delivering programs and projects that benefit the priority population, experience completing at least one similar project in the past, or the necessary partners to meet stated gaps in expertise and experience; if there are multiple organizations involved, credit can be awarded if any of the project leads or key team members meet these criteria.
- For full credit, at least one of the project leads must also have a primary organization focus on one or more of the intended priority populations; this should be evident based on the organization's mission statement and core work.

RESOURCES AND EXAMPLES

- **Glossary** definition of project leads.
- **Glossary** definition of priority population.
- **Glossary** definition of partner or partner organization.

4

Staff (including leadership) and board of the community-serving organization(s) leading the project have prior or current lived experienced with the socioeconomic factors affecting the priority population the proposed project is intended to benefit

DESIRED OUTCOME

Those making decisions that will impact the community have strong insights into community perspectives.

CONSIDERATIONS

- Projects that do not have a CSO functioning as a project lead cannot achieve points for this item.
- If there is more than one CSO functioning as a project lead, points can be achieved if any of them satisfies the criteria.
- Organizational staff (including leadership) and the organization's board should be separately evaluated against the established thresholds.
- Consult annual reporting on staff and board diversity, personnel profiles, or proposal materials to evaluate the demographics and compare to the demographics of the priority population.
- Do not attempt to guess or assume identities if that information has not been voluntarily disclosed; if not otherwise disclosed, request the voluntary sharing of the needed information, with options for entities to provide this individually or as a summary and anonymized as needed or desired by the staff and board.

- In considering partial credit, award higher points for organizations with diverse leadership, and lower credit for organizations with diverse staff that primarily hold junior or entry level positions.

RESOURCES AND EXAMPLES

- **Glossary** definition of CSO.
- **Glossary** definition of frontline communities.

Example: One of the project leads is a CSO with 10 staff members and 5 board members. Five staff (50 percent) and three board members (60 percent) reflect the racial demographics of the community benefiting from the project, achieving full credit.

Example: One of the project leads is a CSO with 10 staff members and 5 board members. Six staff (60 percent) and one board member (20 percent) reflect the racial demographics of the community benefiting from the project. Because the minimum threshold of 30 percent for both staff and board members is not met, no credit is awarded.

5

For-profit organizations are diverse-owned

DESIRED OUTCOME

Counteract historic patterns of underemployment, intergenerational wealth gaps, and lower income in priority populations by enabling wealth-building opportunities and economic inclusion.

CONSIDERATIONS

- This requirement applies to project leads only.
- Evaluate each for-profit partner serving as a project lead; start by determining whether the project leads hold relevant certifications of diverse ownership, such as being minority-owned business enterprises (MBE), woman-owned business enterprises (WBE), veteran-owned, or LGBT-owned business enterprises (LGBTBE)
- Organizations may or may not have the capacity to earn a certification to verify this information; formal certifications are not required to earn credit, but are useful in aiding evaluation.
- Projects delivered exclusively by nonprofit entities and fully member- or worker-owned cooperatives earn full credit.

RESOURCES AND EXAMPLES:

- **Glossary** definition of diverse-owned (business).
- **Glossary** definition of project leads.

6

Project team, including staff,

DESIRED OUTCOME

contractors, and other partners have demonstrated implementation experience and relevant qualifications that will support project success

Participating organizations are qualified and capable of delivering the project.

CONSIDERATIONS

- Relevant qualifications include (but are not limited to) certifications, degrees, or completed training in relevant fields; a track record of delivering similar work; or life experience and expertise directly related to the community or planned project.
- Demonstrated implementation experience should consist of past work relevant to the core elements of the proposed project.

RESOURCES AND EXAMPLES

- **Glossary** definition of project team.

Example – full credit: A project proposes a workforce training program that focuses on energy efficiency retrofits. The project team includes a career guidance counselor experienced with mapping career paths for the intended trainees, licensed engineers with previous teaching experience to develop and deliver curriculum, contractors with previous experience offering on-the-job training and a community member that understands the relevant issues with employment in the community. Collectively they comprise the necessary expertise, and the project receives full credit.

Example – partial credit: A project proposes a workforce training program that focuses on energy efficiency retrofits. The project team is experienced in developing workforce training for solar installers in the same community but has no previous experience in facility retrofits or energy efficiency in buildings. Because subject matter experience in building science and energy efficiency is critical to develop an effective training program and this capability is not accounted for, the project achieves only partial credit.

7

Project partners include a small or emerging business

DESIRED OUTCOME

Counteracting historic patterns of underemployment and lower income in priority populations by enabling wealth-building opportunities and economic inclusion.

CONSIDERATIONS

- Evaluate each for-profit entity serving as a project partner to determine whether they qualify as a small or emerging business; if one or more partner qualifies, full points are achieved.
- Projects delivered exclusively by nonprofit entities and fully member- or worker-owned cooperatives earn full credit.

RESOURCES AND EXAMPLES

- **Glossary** definition of partner or partner organizations leads.
- **Glossary** definition of small or emerging business.

Project Objectives and Approach

ITEM	CRITERIA	GUIDANCE
8	The readiness project identifies an opportunity concept that is aligned with environmental, social and climate justice principles and outcomes	<p>DESIRED OUTCOME</p> <p>Project identifies an area of opportunity that is relevant to environmental, social and climate justice relevant to the intended population, as opposed to being narrowly focused on the priorities of outside interests.</p> <p>CONSIDERATIONS</p> <ul style="list-style-type: none"> • Evaluate the project concept for alignment with environmental, social and climate justice issues that are relevant to the local community context • Look for evidence that the identified issue or opportunity is considered important by the priority population; types of evidence might include summaries of community surveys, visioning sessions, or needs assessments or letters of support for the project from community stakeholders. <p>RESOURCES AND EXAMPLES</p> <ul style="list-style-type: none"> • Glossary definition of priority population.
9	Intended benefits are directed to priority populations	<p>DESIRED OUTCOME</p> <p>Ensure that project is deliberate in delivering benefits to priority populations.</p> <p>CONSIDERATIONS</p> <ul style="list-style-type: none"> • If the project is directed at a general or broad population, it may not be targeted enough to serve environmental justice objectives. • Unless the project includes eligibility criteria that ensure delivery of benefits to priority populations, consider the broader demographics of the benefiting organization or community and how its composition compares to the general public and priority population. <p>RESOURCES AND EXAMPLES</p> <ul style="list-style-type: none"> • Glossary definition of priority population. <p>Example – benefits are not targeted: A project benefits a local school that has a higher proportion of affluent students than the general public, indicating that the priority populations are not receiving the majority of benefits; therefore, the project does not earn credit, even if some students are in the priority population.</p>

Example – benefits are targeted: A capacity building grant is proposed to an NGO that provides energy efficiency assessments, retrofits and incentives for low-income multifamily properties and households that meet eligibility criteria related to LMI status. This project earns full credit for targeting benefits to a priority population.

10 The readiness project addresses a relevant capacity or planning need, such as training, access to technical assistance, or staff augmentation to manage planning and community involvement processes

DESIRED OUTCOME

Ensure that the project is deliberate in delivering capacity needs that are aligned with the objectives and approach desired by priority populations.

CONSIDERATIONS

- The proposal clearly identifies an existing capacity gap that is relevant to the priority population, and is in alignment with enhancing capacity needed to address the opportunity
- Look for evidence of a strong approach that builds the needed capacity or enables planning. Types of evidence might include providing tools, training and subject matter expertise to a community serving organization; conducting technical evaluations that enable decision-making and planning; or convening community stakeholders in democratic processes to inform future projects and approaches.

RESOURCES AND EXAMPLES

- **Glossary** definition of priority population.

11 Project approach is clear, manageable, and organized to be successful

DESIRED OUTCOME

Project implementations details are well-considered and positioned to deliver the intended outcomes.

CONSIDERATIONS:

- The proposal may include clear and realistic milestones and outcomes, but if extensive risks and dependencies exist, the project approach may not be successful; look for evidence that likely barriers and challenges have been anticipated, the associated risks mitigated in the project approach, and that processes are in place that will enable nimble mid-project adjustments as needed.
- Assess the appropriateness and plausibility of due diligence efforts, technical delivery aspects of the project, and community involvement components.

RESOURCES AND EXAMPLES

Example – inadequate project approach: A solar installation workforce training program is proposed in a frontline community. The training curriculum is intended to be developed by a coalition of stakeholders, but partners for critical roles such as training delivery are not identified. Further, likely barriers that are known to have prevented participation by community members in similar programs in the past have not been address, such as transportation to the training sites. Because these missing elements are critical aspects of successfully implementing the proposed program, the project earns no credit.

Example – appropriate project approach: A proposal for a clean energy educational program for K-12 students in an under-resourced school district includes commitments to train local teachers in the curriculum. The project timeline includes additional time for teacher training, and compensates trainees for their time preparing to deliver the new curriculum and providing additional resources for the long-term success of the program. This approach, along with clearly establish roles for all the critical program development and delivery functions, indicates that project team is preparing for a successful outcome. The project earns full credit.

12

Project budget is complete and reasonable

DESIRED OUTCOME

Project is likely to be fully implemented because costs are well understood and planned for.

CONSIDERATIONS

- Consider if the overall project budget is within range of cost benchmarks for similar projects in the same market, focusing on order-of-magnitude discrepancies; keep in mind that ideal projects with high-road labor standards, joint partnerships, and robust community involvement may have cost premiums compared to low-bid offerings.
- Evaluate the reasonableness and completeness of both planned hard costs (e.g., materials and equipment) and soft costs (e.g., administrative, project management, training, and labor).
- Compare the labor costs budgeted here to related evaluation items, such as those assessing for living wages.
- Depending on the project timeline, planning for inflation or market shifts in costs may be appropriate, particularly for multiyear projects.

Resources and examples:

Example – project budget is incomplete: A workforce development and internship program for solar installation is proposed, and the budget indicates line items for training development and delivery, and stipends for participants. However, local codes have a licensing requirement for solar installers that interns must obtain, and the budget does not account for the licensing costs. The project earns partial credit.

Example – project budget is unreasonable: A capacity building grant is proposed by a nonprofit organization that works to promote electrification projects in affordable housing. The grant targets funding for leadership development and training to help the organization with advocacy, including enrolling key staff in a third-party training and certification program. The project budget is only one-tenth the cost of known credentialing programs offered in the field, and the lower costs are not adequately explained within the project approach. The project earns no credit.

Appendix A

For more detail on the spectrum and examples of different levels of participation, visit: https://www.facilitatingpower.com/spectrum_of_community_engagement_to_ownership

THE SPECTRUM OF COMMUNITY ENGAGEMENT TO OWNERSHIP



2

