



# Funding Guidelines Checklist for Reviewing Program Guidelines and/or Solicitation Materials

Agency Name:

Program Name:

## Instructions

Administering agencies should use this checklist to keep track of how Funding Guidelines requirements and recommendations are incorporated into program documents, such as guidelines and solicitations. Reference listed Funding Guidelines sections for details on how to sufficiently meet these requirements and recommendations. Once administering agencies have made changes, fill out questions one and two and provide this checklist along with the relevant documents for CARB's review. CARB will review the documents and fill out question three before agency finalizes and posts documents.

**Requirement 1: Clearly state the requirement that all programs must facilitate GHG emissions reductions and further the purposes of [AB 32](#). (FG section III.B.1. GHG emissions reductions, page 32)**

**Suggested language:** The [Program Name] furthers the purpose of AB 32 (Chapter 488, Statutes of 2006), SB 375 (Chapter 728, Statutes of 2008), and SB 32 (Chapter 249, Statutes of 2016) by investing in projects that reduce GHG emissions by [enter ways project types will facilitate emissions reductions].

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:

3. CARB review and comments:

**Requirement 2: In guidelines and solicitation materials, describe how the program will maximize benefits to priority populations and evaluate projects for potential benefits (FG section III.B.2. Maximize benefits to priority populations, page 32)**

**Suggested language:** *California Climate Investments are required to meet minimum levels of investments to projects that benefit residents of disadvantaged communities, low-income communities, and low-income households, collectively referred to as “priority populations”. To count toward statutory investment minimums, administering agencies must determine if a project meets the criteria for providing direct, meaningful, and assured benefits to priority populations by identifying that a project is located within a census tract identified as a disadvantaged community or low-income community, or directly benefit residents of a low-income household, that the project meaningfully addresses an important need, and that the project directly address the identified need. [Agency] will use a Benefit Assessment Tool to determine if investments have a direct benefit to priority populations. Benefit Assessment Tools for this program will be available on the [California Climate Investments Quantification Tools](#) page.*

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:
3. CARB review and comments:

**Requirement 3: Explain that all applicants must use CARB quantification methodologies and co-benefit assessment methodologies to estimate project benefits, where available. Refer to section III.C for more information on requirements (FG section III.B.3. GHG quantification methodologies and co-benefit assessment methodologies, page 33)**

**Suggested Language:** *All applicants must use CARB quantification methodologies and co-benefit assessment methodologies to estimate project benefits, if applicable. If no existing CARB methodologies are available, [program] staff will work with CARB to develop consistent methodologies for quantifying GHG reductions and other economic, environmental, and public health co-benefits.*

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:
3. CARB review and comments:

**Requirement 4: Clearly describe the application process and how projects will be selected Refer to Table 5 in this section for a description of requirements for application process and project selection. (FG section III.B.4. Project selection requirements, page 34)**

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:

3. CARB review and comments:

**Requirement 5: Administering agencies may consider including draft legal agreements with general terms and conditions when releasing draft program guidelines to inform applicants of administrative requirements and accountability procedures (FG section III.B.5. Project implementation requirements, page 35)**

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:
3. CARB review and comments:

**Requirement 6: Describe how the administering agencies and funding recipients will track and document GHG emissions reductions, co-benefits, reporting requirements, and other information (FG section III.B.6. Project tracking, metrics, and reporting, page 35)**

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:
3. CARB review and comments:

**Requirement 7: Administering agencies and all funding recipients must include recognition of funding through California Climate Investments on websites, announcements, press releases, program materials, events and social media (FG section III.B.7 Accountability Tools, page 26)**

1. How do current program documents incorporate this requirement?
2. How will this requirement be incorporated into program documents? Specify the exact location where this requirement will be included:
3. CARB review and comments:

**Recommendation 1: Administering agencies should engage in in-house and/or third-party evaluation activities, as feasible and appropriate, that result in program and/or project evaluation reports. The administering agency is responsible for including appropriate language regarding any necessary evaluation requirements in contracts and agreements with funding recipients (FG section VI.E Program and Project Evaluations, page 67)**

1. How do current program documents incorporate this recommendation?
2. How will this recommendation be incorporated in program documents? Specify the exact location where this recommendation will be included:
3. CARB review and comments: