Priority Populations Benefit Assessment Tool

Project Type: Energy

Purpose: The benefit assessment tool is used to determine if a project funded by California Climate Investments is located within and provides a benefit to a priority population.

Who uses it: Administering agencies, applicants, and/or funding recipients.

Background: Whenever possible, projects should have direct, meaningful, and assured benefits to residents of disadvantaged communities, low-income communities, and low-income households. These three groups are collectively called *priority populations*.

This tool must be used to determine if a project benefits a priority population. California Climate Investments recognizes a project as benefiting a priority population if it meets one option in each of the three steps of the benefit assessment tool.

There are different *benefit assessment tools* for different types of projects. For complex projects, there may be more than one that is a good fit. Email the *GGRF Program* for any questions related to this tool.

Project Type Description: Projects will facilitate the transition away from fossil fuels and improve energy resilience through energy efficiency, electrification, and clean energy generation. Project examples may include installation of more efficient or more advanced heating, ventilation, and air conditioning equipment, or lighting systems; building envelope improvements such as insulation, window shading devices, and energy management systems; solar water heaters, photovoltaic systems, wind energy systems, community solar projects, energy storage systems, microgrids, clean hydrogen systems, or renewable fuel or low-carbon fuel facilities.

Steps to Determine if a Project Benefits a Priority Population

Select one option per step to answer the question: "Does this project benefit a priority population?" with a "yes" or "no." This tool does not capture all benefits a project may provide.

Step 1: Identify the Priority Population. The project must be located within a community identified as disadvantaged or low-income, or directly benefit residents of a low-income household;

Step 2: Identify a Need. The project must identify an important community or household need for the priority population identified in Step 1; and

Step 3: Provide a Benefit. The project must provide one of the direct, meaningful, and assured benefits listed in Step 3. The benefit must be to the priority population identified in Step 1 and must directly address the need identified in Step 2.

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Step 1 – Identify the Priority Population

Instructions: Review the questions below and select one that is a "yes" for the project.

> **Note**: The entire project must be located within the priority population(s) that benefit from the project.
>
> **For projects that offer consumer-based incentives** (e.g., vouchers, rebates, energy bill credits, or access to low-cost capital), the project location may be determined by the residential address of the direct recipient.
>
> **For projects in multi-family buildings**, the project location (i.e., within a low-income household) may be determined by where the majority of the households are located.
>
> **For infrastructure projects**, priority population benefits may only be claimed if a majority of households within the project area (e.g., electricity service area) are designated as priority populations.
>
> **Resources**: Visit the *California Climate Investments Resource Portal* for the:
> - Priority Populations Map: a geographic tool to identify disadvantaged communities and low-income communities by address or census tract.
> - Low-income Household Tool: a look-up tool to find low-income thresholds by county and household size.

- ☐ **A. Disadvantaged Community:** Is the project located in a disadvantaged community census tract or disadvantaged community Tribal land?
- ☐ **B. Low-income Community:** Is the project located within the boundaries of a low-income community census tract?
- ☐ **C. Disadvantaged Community ½ mile neighbor:** Is the project located outside of, but within a ½ mile of, a disadvantaged community and also in one of the following:
  - a low-income community census tract?
  - a low-income household?
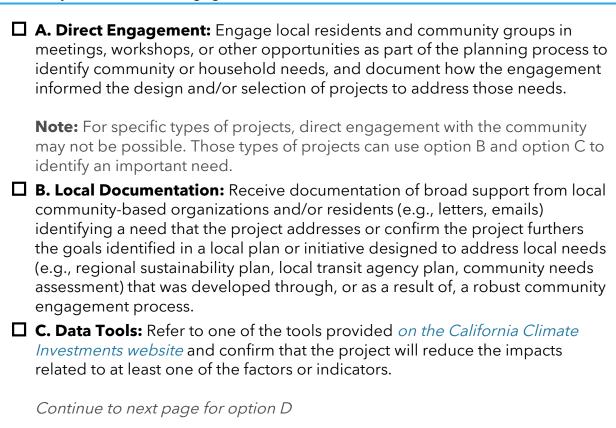- ☐ **D. Low-income Household:** Is the project located in a low-income household?

Step 2 – Identify a Need

Instructions: Review the options below and select one that explains how the community or household need for the priority population identified in Step 1 was determined.

> **Note**: California Climate Investments strongly encourages that program administrators and those that plan and implement projects work directly with local community residents and community-based organizations to identify and meaningfully address an important need.
>
> **Resources**: Visit the *California Climate Investments Resource Portal* to explore promising practices, success stories, and other guides and resources about community outreach and engagement.

☐ **A. Direct Engagement:** Engage local residents and community groups in meetings, workshops, or other opportunities as part of the planning process to identify community or household needs, and document how the engagement informed the design and/or selection of projects to address those needs.

   Note: For specific types of projects, direct engagement with the community may not be possible. Those types of projects can use option B and option C to identify an important need.

☐ **B. Local Documentation:** Receive documentation of broad support from local community-based organizations and/or residents (e.g., letters, emails) identifying a need that the project addresses or confirm the project furthers the goals identified in a local plan or initiative designed to address local needs (e.g., regional sustainability plan, local transit agency plan, community needs assessment) that was developed through, or as a result of, a robust community engagement process.

☐ **C. Data Tools:** Refer to one of the tools provided *on the California Climate Investments website* and confirm that the project will reduce the impacts related to at least one of the factors or indicators.

Continue to next page for option D

Note: Option D is for programs or projects serving individual households or

Note: Option D is for programs or projects serving individual households or businesses only, such as through vouchers or rebates distributed to qualifying applicants on either a first-come, first-served basis or on a needs-based model.

☐ **D. Direct Engagement During Program Development:** During program design, outreach, or updates, engage residents and community groups from priority populations to identify community or household needs and document how the engagement informed the design of the program to address those needs.

Instructions: Describe the community or household need and how it was identified. If option "B. Local Documentation" was chosen, briefly describe the documentation. If option "C. Data Tools" was chosen, include the name of the tool in the description.

Next Step: If an option in Step 2 is selected, continue to Step 3. If none are selected, do not continue.

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Step 3 – Provide a Benefit

Instructions: Review the options below and select one that demonstrates how the project directly benefits the priority population identified in Step 1 and addresses the need identified in Step 2.

> **Note**: Projects must avoid potential substantial burdens or harms to priority populations.
>
> **Resources**: Visit the *Climate Investments Resource Portal* to learn more about strategies for projects to avoid causing burdens and harms, including working with community members and community advocates to identify potential burdens or harms whenever possible.

- ☐ **A.** Project provides direct energy cost savings or reduces energy cost burden to priority population(s).
- ☐ **B.** Project reduces on-site criteria air pollutant or toxic air contaminant emissions through reduction of fossil fuel consumption.
- ☐ **C.** Project improves energy or community resilience or provides grid outage mitigation.
- ☐ **D.** Project provides increased access to clean and reliable energy.

Next Step: If the project meets one option in each of the three steps above, then it is located within and considered to provide a direct, meaningful, and assured benefit to priority populations.