

Evaluation Criteria for Providing Benefits To Priority Populations  
AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES

California Climate Investments  
2018 Funding Guidelines  
Benefit Criteria Table



**Project Type:**  
**AFFORDABLE HOUSING AND SUSTAINABLE COMMUNITIES**

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.”

All projects counting toward the statutory investment minimums must be located within an identified community and benefit individuals living within that community, or directly benefit residents of low-income households anywhere in the State. Administering agencies must determine if a project meets the criteria for providing direct, meaningful, and assured benefits to priority populations using the following evaluation approach:

**Step 1: Identify the Priority Population(s).** Be located within a census tract identified as a disadvantaged community or low-income community, or directly benefit residents of a low-income household;

**Step 2: Address a Need.** Meaningfully address an important community or household need for the disadvantaged community, low-income community, or low-income household; and

**Step 3: Provide a Benefit.** Using the evaluation criteria, identify at least one direct, meaningful, and assured benefit that the project provides to priority populations. The benefit provided must directly address an identified need.

Only investments that meet these criteria will be counted toward achieving the statutory investment minimums identified for priority populations. Administering agencies can fund projects that otherwise provide meaningful benefits, but do not meet these criteria; however, those projects will not be counted toward investment minimums.

The following table includes criteria for administering agencies to use to determine whether projects satisfy each of the three steps. The criteria are designed to enable administering agencies to readily make an objective “yes” or “no” decision about whether a particular project provides a benefit to a priority population.

Administering agencies must use the criteria table that is applicable to the specific project type(s) funded. For complex projects, there may be more than one applicable criteria table. A complete list of available criteria tables is available at:

[www.arb.ca.gov/cci-fundingguidelines](http://www.arb.ca.gov/cci-fundingguidelines).

Administering agencies must refer to CARB’s Funding Guidelines for direction on how to use the criteria table in program design and implementation, project evaluation, project selection, and reporting ([www.arb.ca.gov/cci-fundingguidelines](http://www.arb.ca.gov/cci-fundingguidelines)).

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**Project Type:** Projects will increase the accessibility of housing, employment centers, and key destinations through infill and transit-oriented affordable housing development, complete streets, and/or low carbon and active transportation options, thereby reducing vehicle miles traveled.

*Projects must satisfy the applicable criteria through Step 3 to be considered to provide direct, meaningful, and assured benefits to priority populations and count toward statutory investment minimums.*

**Step 1 – Identify the Priority Population(s).**<sup>1</sup> Evaluate the project against each of the following criteria. Check all boxes that apply.

Note: For this project type, the majority of the project must be located within a disadvantaged or low-income community census tract.

- A. Is the project located within the boundaries of a **disadvantaged community census tract**?
- B. Is the project located within the boundaries of a **low-income community census tract**?
- C. Is the project located outside of a disadvantaged community, but **within ½-mile of a disadvantaged community and within a low-income community census tract**?
- D. Is the project located within the boundaries of a **low-income household**?

*If a project does not meet at least one of the qualifying criteria in Step 1, the project does not count toward statutory investment minimums and no further evaluation is needed. If the project meets at least one Step 1 criterion, continue the evaluation in Step 2.*

**Step 2 – Address a Need.** Identify an important community or household need and evaluate whether the project provides a benefit that meaningfully addresses that need.

To identify a need that the project will address, agencies and/or applicants can use a variety of approaches:

- A. **Recommended Approach:** Host community meetings, workshops, outreach efforts, or public meetings as part of the planning process to engage local residents and community groups for input on community or household needs, and document how the received input was considered in the design and/or selection of projects to address those needs;
- B. **Recommended Approach:** Receive documentation of support from local community-based organizations and/or residents (e.g., letters, emails) identifying a need that the project addresses and demonstrating that the project has broad community support;

<sup>1</sup> An online mapping tool of identified disadvantaged communities and low-income communities, and a “look-up” tool list of “low-income” thresholds by county and household size are available at: <https://www.arb.ca.gov/cci-communityinvestments>.

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**Step 2 – Address a Need (continued).** *Identify an important community or household need and evaluate whether the project provides a benefit that meaningfully addresses that need.*

- C. **Alternative Approach:** Where direct engagement is infeasible, look at the individual factors in CalEnviroScreen that are most impacting an identified disadvantaged or low-income community (i.e., factors that score above the 75<sup>th</sup> percentile), and confirm that the project will reduce the impacts of at least one of those factors; or
- D. **Alternative Approach:** Where direct engagement is infeasible, refer to the list of common needs for priority populations in CARB’s Funding Guidelines Table 5 and confirm that the project addresses at least one listed need.

**Describe identified community or household need(s):**

*If the project addresses a community or household need as described in Step 2, proceed to Step 3. If the project does not address a community or household need, it will not count toward statutory investment minimums and no further evaluation is needed.*

**Step 3 – Provide a Benefit.** *Evaluate the project against each of the following criteria to determine if it provides direct, meaningful, and assured benefits to priority populations. The benefit provided must directly address the identified need.*

Project must meet at least one of the following benefit criteria:

- A. Project provides new affordable housing development near transit and/or increases the supply of available affordable housing units near transit, and is designed to avoid displacement of residents from the surrounding communities;
- B. Project preserves the supply of affordable housing that is at-risk of conversion to market rate or is in need of rehabilitation (e.g., through acquisition and substantial rehabilitation) for priority populations.

*If the project meets the criteria in Steps 1, 2, and 3, it will be considered as providing direct, meaningful, and assured benefits to priority populations and will be counted toward statutory investment minimums.*