



Creating Successful CERTs Projects:

A guide to planning,
application & evaluation





Presentation Overview

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Goals of CERTs

What is CERTs looking for in a proposal?

- Relates to clean energy or energy efficiency
- Includes a community engagement component
- Fosters new collaborations and partnerships
- Cost-effective and well-planned use of resources
- For research: A topic that builds off of another or can provide the foundation for future research and/or action



Types of Projects*

- **Clean Energy**
 - Wind
 - Solar (PV or Thermal)
 - Other (*e.g.* geothermal, biomass)
- **Efficiency**
 - Low-Cost, No-Cost
 - Lighting
 - Building Efficiency
- **Education**
 - Community-Based
 - School-Based
- **Research** — including feasibility studies
- ***Education and Research can be components of another project or stand-alone***

**These examples based on past CERTs-funded projects—we're always interested in new ideas*



Planning Your Project*

- What are YOU or your organization interested in?
- What would interest your greater community?
- What resources do you have available? (*e.g.* expertise, funding, similar projects)
- What are your primary goals? (Be sure to tell CERTs!)
- What is the best, most cost-effective use of your resources?
- What will be the project's lasting effects or consequences?
- What are others in your region doing?

**CERTs has many resources to help you plan your project, too—visit our project planning tools:*



The RFP Application

Included in the application:

- General contact information
- Information about the project
- Project Description
- Project Results
- Project Worksheets
- Project Funding Plan





Project-Specific Worksheets

For more common project types, CERTs developed sets of questions to aid in proposal evaluation and data tracking. Examples include the number of students involved in an education project or the number of kWh offset over a lifetime by a wind turbine.

Applicants should use the best estimates to complete these worksheets and may need to complete more than one if the project combines both technical and educational component.

The worksheets will also be used as part of your final report.

The project-specific worksheets are available on the CERTs website.



Proposal Submission

Completing your proposal:

- Fill out application in Microsoft Word—be complete & specific
- Fill out all necessary project worksheets in Microsoft Excel
- Review all materials

Submitting your proposal:

- Create email with subject: “CERTs Grant Application — [Your CERT Region Here]”
- Attach Word application and Excel worksheets
- Email final proposal to RFP@CleanEnergyResourceTeams.org



Proposal Review Criteria

Project Details — 35 pts total

- Project Purpose — 15 pts
- Work Plan — 5 pts
- Timeline — 5 pts
- Collaboration — 10 pts

Project Results — 50 pts total

- Outcomes & Evaluation — 10 pts
- Community Impact — 15 pts
- Worksheet Analysis — 25 pts

Project Funding Plan — 15 pts



Proposal & Grant Timeline

- **Sep. 1, 2009:** Request for Proposals opens
- **Nov. 2, 2009, 4:30pm:** Final proposal deadline
- **Jan. 1, 2010:** Selections made by teams
- **Jan. 5, 2010:** Awards announced
- **Jun. 30, 2010:** Status Update due
- **Oct. 1, 2010:** \$ revoked if project not initiated
- **Dec. 31, 2010:** Reports and Invoices due
- **Payment:** Issued upon receipt of final report and invoice





Final Report

Upon project completion you must submit the following:

- 1. Final Report**
- 2. Appropriate project-specific worksheets**
- 3. All receipts and bills for qualified activities**
- 4. Photos (electronic versions) as available**

After submitting these items, the project funds will be disbursed



For More Information

Visit the [CERTs website](http://www.CleanEnergyResourceTeams.org) for more info about the application process & resources for project planning