

DATA DOCUMENT



TBL TOOL DATA REQUIREMENTS



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I. OVERVIEW

This document provides an overview of the TBL Tool data requirements.

When you are ready to calculate a project's TBL score, the Tool will guide you through a series of questions about the investment. The questions are grouped into six sections. You can move back and forth between sections, save your work, and edit responses. When you have finished answering the questions, a summary report is generated.

Throughout the Tool, a click on the blue "information bubble" provides definitions, instructions, and answers to questions that you may have. Detailed information about measures, data, and scoring can be found in the TBL Tool User's Guide posted on-line.

This document presents each of the TBL Tool questions, in the order they appear in the Tool, as well as the corresponding "information bubble" for each of the questions. You must provide an answer to each question in order to generate a project summary report – a sample of which is included at the end of this document. The document is lengthy because it provides the scoring options and supplemental information for each question. A summary of data requirements without the contents of the "information bubbles" is provided at the end of this document if you would prefer to work with a simple list of questions.

Note that economic development projects that do not have a specific location or address (e.g., a citywide conservation program) cannot be evaluated in the beta version of the TBL Tool. In addition, the Tool cannot be applied to the US Territories at this time due to data limitations (Puerto Rico Guam, Marianas, US Virgin Islands, or American Samoa).

Keep in mind that the Tool is in its beta test phase. We are eager to hear your feedback regarding what's working well and what's not. You can share your feedback by completing a brief user's survey. The survey appears when you have completed data entry for your project and also can be accessed from the main navigation bar of the TBL Tool website.

II. LOCATION INFORMATION

Data entry begins in the mapping section of the Tool where you will identify the project address and project boundaries. Three sample screenshots follow, demonstrating how you move from a national map to project boundaries.

Specify Location

Answer Questions:

Investment

Industry, Jobs and Wages

Construction & Operations

Placemaking

Governance

Generate TBL

1 Enter a location in the search box below and click Go, or zoom the map to your project area. Then, go to step 2.



GO

[Start Over](#)

2 [Click here](#) to draw the general boundaries of your project. Enter a name and description for the project and click save. Then, go to step 3.

3 Click the Next button to start entering your data.

NEXT >>



Specify Location

Answer
Questions:

Investment

Industry, Jobs and Wages

Construction & Operations

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Governance

Generate TBL

1 Enter a location in the search box below and click Go, or zoom the map to your project area. Then, go to step 2.



98368

GO

[Start Over](#)

2 [Click here](#) to draw the general boundaries of your project. Enter a name and description for the project and click save. Then, go to step 3.

3 Click the Next button to start entering your data.

NEXT >>



Specify Location

Answer Questions:

Investment

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1 Enter a location in the search box below and click Go, or zoom the map to your project area. Then, go to step 2.



98368

GO

2 [Click here](#) to draw the general boundaries of your project. Enter a name and description for the project and click save. Then, go to step 3.

3 Click the Next button to start entering your data.

NEXT >>

[Start Over](#)



III. PROJECT DESCRIPTION

After defining the project's boundaries, you will be asked to briefly describe the project and identify the project type.

1. Please provide a brief description of your project (500 character maximum).

2. What type of economic development project is being proposed? Check the **box or boxes** that best represents your economic development project. If your project includes more than one project type, check all that apply.
 - Business Incubator
 - Business or Industrial Park
 - Culture, Parks, Recreation, or Tourism
 - Education
 - Health Care
 - Housing
 - Infrastructure serving a specific economic development project (e.g., a road to a technology park or a water treatment for a manufacturing facility)
 - Infrastructure serving a general area (e.g., a trail system or a sewer plant expansion serving the community)
 - Information Services
 - Manufacturing/Industrial
 - Mixed Use Development
 - Natural Resources (Agriculture, Energy, Forestry, Fisheries, Mining)
 - Office
 - Retail
 - Research and Development
 - Wholesale/Distribution
 - Workforce Development/Training
 - Other – please describe

IV. DATA SECTIONS

The TBL Tool questions appear in a user-friendly web-based format. The following is a sample data entry screen:

Now we will be collecting some information regarding the project budget and funding sources.
After you finish answering each question in this section, click Next to continue.

Investment

- 1 What is the total project cost?
- 2 What amount of total project costs, if any, will be paid for with private investment? [i](#)
(If no private investment, please enter "0")
- 3 What amount of total project costs, if any, will be paid for with public investment? Public investment includes local, state, or federal contributions to hard or soft development costs. [i](#)
(If no public investment, please enter "0")
- 4 What amount of funding are you requesting from this organization/investor? [i](#)
(If none, enter "0")
- 5 Has a Pro Forma been conducted that demonstrates financial viability of the project? [i](#)
 Yes
 No
 N/A
- 6 Does the investment include a program or policy to prioritize purchase of goods and services from locally owned and operated businesses where appropriate? [i](#)
 Yes
 No
 Don't Know
 N/A

PREV >>

NEXT >>

The following data table includes the TBL Tool beta version questions, as well as response and scoring options. We have also provided the “info bubble” contents to help answer questions you may have. Note that some of the questions are scored as bonus points or for information purposes only and are not included as part of the core TBL score (i.e., not penalized if the item is not addressed by the project). In addition, items that are not relevant to a specific project are not included in the score (e.g., affordable housing is not part of score if the project does not have a housing component). Finally, please recall that the questions will have a different appearance in the easy to navigate web-based interface.

A. INVESTMENT	Answer Options
<p>3. What is the total project cost?</p> <p>For capital projects, total project costs are the hard and soft costs directly contributing to completion of the capital project. If the project being proposed is an infrastructure investment directly serving a planned economic development project (e.g., a road to a new tech park, water treatment for a new manufacturing facility), please use the total cost of the project that the infrastructure is designed to serve. For non-capital projects, total project costs are the hard and soft costs incurred for the specific project period.</p> <p>Hard costs may include land or building acquisition, site preparation and mitigation, construction, equipment, infrastructure and utilities directly contributing to the project. Land cost is the purchase price or, if donated, the assessed value of land donated -- with zero as the minimum (i.e., no negative value if the site is a brownfield). Soft costs may include assessments and studies, professional services (e.g., architectural, engineering, legal), inspections, permits, insurance, financing, and operating costs for non-capital project.</p> <p>① <i>How is this information used?</i> Project costs and leverage are displayed in the project summary report because this information is useful to many investors and decision-makers; however, this information is not used in the project scoring because it is not directly tied to triple bottom line impact. The summary report displays two types of leverage: private dollars invested per public dollar invested, and additional dollars of investment per dollar of funder’s investment.</p> <p><i>Data note:</i> Tax reductions and incentives (e.g., capping increases in assessed value of property) are not included in project costs because they are not a direct outlay contributing to completion of the project. However, tax reductions and other incentives can significantly impact the triple bottom line of the project over time. Such incentives can be accounted for in the Tool in the fiscal impact measure (positive, neutral, or negative impact), and the accountability measure (agreements in place that link incentives or payments with performance).</p>	<p>\$ _____</p>
<p>4. What amount of total project costs, if any, will be paid for with private investment?</p> <p>Private investment includes loans, grants, developer contributions, other private equity, and in-kind contributions from non-public sources. If this application is for private funds, include the requested amount in this figure (e.g., if this request equals \$100,000 and \$400,000 of other private funding is being contributed, then the total private investment figure that you should enter in the Tool is</p>	<p>\$ _____</p>

<p>\$500,000). If there is no private investment, enter “0.”</p> <p>① <i>How is this information used?</i></p> <p>The ratio of private to public funding is displayed in the project summary report because this information is useful to many investors and decision-makers. The information is not part of the overall project score because there is no empirical tie to the bottom line (e.g., no definition of a “good” or “bad” mix of public/private investment). In many instances, public-private financing partnership is essential to project viability. This is particularly the case when a project serves important public objectives but has low financial returns (e.g., infrastructure, affordable housing), or when there is a higher than average degree of risk or cost (e.g., regeneration area). At the same time, fiscal responsibility and stewardship of public dollars suggests that due diligence be given to ensure that the level of private investment is appropriate to the context. Thus, this information is provided as an FYI.</p> <p><i>Data note:</i> If the project funding includes tax credit financing (e.g. New Markets Tax Credit, Historic Tax Credit, Low Income Housing Tax Credit) the amount requested from the source of that credit should be included here as part of the private investment share of total project costs.</p>	
<p>5. What amount of total project costs, if any, will be paid for with public investment?</p> <p>Public investment includes local, regional, state, and/or federal contributions to hard and/or soft project costs, excluding tax incentives. If this application is for public resources, include the requested amount in this figure (e.g., if this request equals \$100,000 and \$400,000 of other public funding is being contributed, then the total public investment figure that you should enter in the Tool is \$500,000). If there is no public investment, enter “0”.</p> <p>① <i>How is this information used?</i></p> <p>The ratio of private to public funding is displayed in the project summary report because this information is useful to many investors and decision-makers. However, the information is not included in the overall project score because there is no empirical tie to the bottom line (e.g., no definition of a “good” or “bad” mix of public/private investment). In many instances, public-private financing partnership is essential to project viability. This is particularly the case when a project serves important public objectives but has low financial returns (e.g., infrastructure, affordable housing), or when there is a higher than average degree of risk or cost (e.g., regeneration area). At the same time, fiscal responsibility and stewardship of public dollars suggests that due diligence be given to ensure that the level of private investment is appropriate to the context. Thus, this information is provided as an FYI.</p> <p><i>Data note:</i> If the project funding includes tax credit financing (e.g. New Markets Tax Credit, Historic Tax Credit, Low Income Housing Tax Credit) the amount requested of the funder is included above with total <i>private</i> investment. The cost to society of foregone tax revenue is important to consider but is not counted here as a direct expenditure contributing to completion of the project. Similarly, tax reductions (e.g., capping increases in assessed value of property, tax credits) are not included in total project costs because they are not a direct outlay contributing to completion of the project. Tax incentives can significantly impact the triple bottom line and are accounted for in the Tool in the fiscal impact measure (positive, neutral, or negative impact), and the accountability measure (agreements in place that link incentives or payments with performance).</p>	<p>\$ _____</p>

<p>6. What amount of funding are you requesting from this organization/investor? Enter the amount of investment (e.g., loan, equity, grant) that is being requested. If no funding is being requested (e.g., review or approval by a planning agency), enter "0".</p> <p>① <i>How is this information used?</i> The funding request and leverage are displayed in the project summary report because this information is useful to many investors and decision-makers; however, this information is not used in the project scoring because it is not tied to triple bottom line impact. The funding leverage is the amount of additional investment per dollar of funder's investment. <i>Data Note:</i> If the request is for tax credit financing (e.g., New Markets Tax Credit, Historic Tax Credit, Low Income Housing Tax Credit), the figure entered here is the loan/equity investment (e.g., gap financing) being requested of the funder. For example, a developer with a \$10 million project and has secured \$2 million of private equity, \$5 million of commercial debt, and \$1.5 million in TIF funding (\$8.5 million of \$10 million), might be requesting \$1.5 million of tax credit financing to fill his or her gap.</p>	<p>\$_____</p>
<p>7. Has a Pro Forma been conducted by a qualified professional analyst that demonstrates financial viability of the project? ① <i>How is this information used?</i> A project earns 100 points if a pro forma has been completed by a qualified professional analyst and demonstrates financial viability of the proposed investment. No points are earned if a pro forma by a qualified professional analyst has not been conducted that demonstrates financial viability of the proposed investment.</p> <p>A pro forma provides financial projections for a project's expected revenues and expenses. Assumptions used in creating the projections should be disclosed and conservative estimates used. This important due diligence procedure is designed to assess profitability of the investment, a key component of triple bottom line performance.</p>	<p>Yes</p> <p>No</p> <p>NA</p> <p>If NA, please explain.</p>
<p>8. Does the investment include a program or policy to prioritize or encourage the purchase of goods and services from businesses that are owned and operated in the metropolitan area, micropolitan area, or county in which the project is located (i.e., supports retention of dollars in the local economy)? ① <i>How is this information used?</i> This measure assigns bonus points if there is a program or policy in place to prioritize or encourage the purchase of goods and services from businesses that are owned and operated in the metropolitan area, micropolitan area, or county in which the project is located (i.e., supports retention of dollars in the local economy when appropriate). No points are earned if there is not a program or policy.</p> <p>Purchasing goods and services from local merchants can be an effective way to inject dollars into the local economy, thereby helping to keep businesses open, people employed, and streetscapes vibrant. Determining when to patronize locally owned and operated businesses will depend upon the context. For example, if the local option for a given good or service has significantly higher costs or lower quality, then impacts to competitiveness or satisfaction suggest that the non-local option may be preferable. This measure aims to support local economic vitality by encouraging consideration of local impacts of purchase decisions. Additional information about this measure can be found in the TBL Tool User's Guide posted on the TBL Tool website.</p>	<p>Yes</p> <p>No</p> <p>Don't Know</p>

B. INDUSTRY, JOBS & WAGES

Direct Jobs

This section provides information about the sector(s) and jobs that are part of this project. The first set of questions pertains to direct jobs created and/or retained.

A series of pull down menus allow the user to identify the industry or industries that are a part of this project. Information may be entered for up to 5 sectors (industries). If the project includes more than 5 industries, please select the top 5 by number of direct jobs created or retained.

If this is an infrastructure investment directly serving an economic development project (e.g., road to tech park, water treatment for manufacturing facility) please enter the industry or industries and jobs for the project that the infrastructure is designed to serve. NAICS code information can be found at <http://www.census.gov/cgi-bin/sssd/naics/naicsrch?chart=2007> and <http://www.census.gov/eos/www/naics/>. The Tool uses 2007 codes. The Bureau of Labor Statistics will introduce NAICS code changes in 2012 and revisions to the Tool will be made as appropriate.

For each project industry identified, enter the number of direct jobs created and/or retained when the project is complete. This figure includes part-time and seasonal employees. Enter jobs as FTE (full-time equivalents), which is based on a 40 hour per week workload (2080 hours per year). An employee working 20 hours per week is considered .50 FTE, while two employees each working 20 hours per week equal 1.0 FTE. Do not include construction jobs, as those are counted elsewhere.

1. Direct (non-construction) jobs

	Industry Name	NAICS Code	# of FTE direct jobs created and/or retained
Industry 1			_____ jobs
Industry 2			_____ jobs
Industry 3			_____ jobs
Industry 4			_____ jobs
Industry 5			_____ jobs

① How is this information used?

Information regarding direct permanent job creation and retention is reported in order to provide a sense of expected impact. The information is not included in the project's TBL score because there is no standard for defining a "good" or "bad" number of jobs created and retained.

The number of jobs per sector is identified because some of the Tool calculations consider impacts by industry (wages, industry eco-efficiency, and environmental health). The standard for categorizing businesses by sector or industry is the North American Industry Classification System (NAICS) (<http://www.census.gov/eos/www/naics/>). NAICS codes begin at the two-digit level, with further specification of subsectors provided up to the six-digit level. For example, 31 manufacturing, 311 food manufacturing, 3112 grain and oilseed milling, 31121 flour milling and malt manufacturing, and 311212 rice milling. For most industries, the user is asked to provide the three-digit level. Retail and wholesale stop at the two-digit level, while a few others go one or two levels deeper. The level of NAICS requested is determined based on the level of variation in environmental impact that occurs in the sector (i.e., more detailed information is only requested when impacts vary widely among the subsectors of an industry) and wage data availability (i.e., county level data is often not available below the three digit level). Up to five industries may be identified for a project.

If the project includes more than five industries, the top five with respect to job creation and retention should be entered.

For retained jobs, information regarding the imminent threat should be documented. Jobs performed by independent contractors can be included in the jobs figure and should be noted in the documentation.

Sample NAICS Code Entry: An example of the pull down interface is below. If no direct jobs are entered then the Tool will skip to construction jobs.

THE TRIPLE BOTTOM LINE TOOL

HOME
ABOUT THIS TOOL
CALCULATE YOUR TBL
CASE STUDIES
BETA FEEDBACK

Specify Location
Answer Questions:
Investment
Industry, Jobs and Wages
Construction & Operations
Placemaking
Governance
Generate TBL

This section provides information about the sector(s) and jobs that are part of this project.

The first set of questions pertains to direct permanent jobs created and/or retained.

You will be able to enter information for up to 5 sectors (industries). If your project will include more than 5 industries, please select the top 5 by number of direct permanent jobs created or retained. Information regarding construction jobs will be provided in another section.

Using the pull down menus below, please select the industry(ies) that are a part of this project. If this is an infrastructure investment directly serving an economic development project (e.g., road to tech park, water treatment for manufacturing facility) please enter the industry(ies) and jobs for the project that the infrastructure is designed to serve.

Please note how many direct permanent (non-construction) jobs will be created and/or retained in year three (post-project completion) in each of these industries. Enter this information as FTE (full-time equivalents) and do not include construction jobs, as those are counted elsewhere.

Industry, Jobs & Wages

Direct Jobs

1

	Select industry	Select sub-industry	# of direct permanent jobs created and/or retained
1-Industry:	<input type="text" value="Educational Services"/>	<input type="text" value="Educational Services"/>	60
2-Industry:	<input type="text" value="Accommodation and Food Services"/>	<input type="text" value="Food Services and Drinking Places"/>	50
3-Industry:	<input type="text" value="Arts, Entertainment, and Recreation"/>	<input type="text" value="Amusement, Gambling, and Recreation Industries"/>	40
4-Industry:	<input type="text" value="Administrative, Support, Waste Management, Remediation"/>	<input type="text" value="Administrative and Support Services"/>	45
5-Industry:	<input type="text" value="[Select an industry]"/>	<input type="text" value="[Select a sub-industry]"/>	

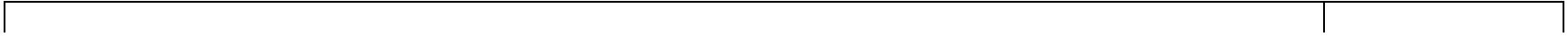
	Answer Options
<p>2. Do you know the expected average annual wages for this project? Yes. No.</p> <p>If yes, a box appears – Please enter the expected average annual wage for the project’s direct jobs created and/or retained. If yes, this data is used to compare expected annual wages with overall county average wages. If no, the calculation is based on NAICS industry average wage for the county compared to county overall average.</p> <p>① <i>How is this information used?</i> Project average wages are compared to county average wages and bonus points are assigned if the project wages are 120% or greater than county average. The calculation is made with the user defined average project wages or, if unavailable, the NAICS defined average project wage in the county. Average wages per NAICS are defined using the Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages. Multiple NAICS are handled with weighting. For example, if the project includes three industries (A, B, C) and the industries provide 25%, 25%, and 50% of the jobs created and retained, respectively, then the average wage calculation is weighted accordingly (.25*average wage in A + .25*average wage in B + .50*average wage in C).</p> <p>A bonus score of 100 is assigned if the investment industry or industries pay higher than average wages for the area (120% or more above county average). There is no penalty if the project does not meet this standard because, in general it is better to generate some wages than none (e.g., taking some lower paying tourism jobs over no jobs at all). Also, the measure score is based on county and industry averages that may be too broad to accurately describe the project. Thus, while the TBL is defined as having good wages, projects do not lose points if the wages are not above average.</p> <p>Good wage jobs are favored because they generally have positive impacts to workers, employers, and the community at large. Well-paying jobs can contribute to community economic vitality by stimulating the economy, generating tax revenues, and reducing the need for public assistance. Further, reward for work is a basic tenet of our society, with the expectation that full-time employment is sufficient to meet basic needs. Additional information about this measure can be found in the TBL Tool User’s Guide posted on the TBL Tool website.</p>	<p>Yes</p> <p>No</p>
<p>3. What percent of the project's direct jobs are existing jobs that are being retained or relocated? If none, please enter "0".</p> <p>① <i>How is this information used?</i> Information regarding direct permanent job creation and retention is reported in order to provide a sense of expected impact. The information is not included in the project’s TBL score because there is no standard for defining a “good” or “bad” number of jobs created and retained. New jobs created are reported separately from existing jobs retained or relocated.</p>	<p>____%</p>
<p>4. Will the number of jobs created or retained distinguish this project as a major employer in the area or have a particularly catalytic impact on employment in the area? An example of a catalytic project is an arts center that does not create a lot of direct jobs but is a destination of renown that greatly supports the creation of jobs in tourism and arts related businesses. Another example might be a small technical center that provides critical assistance to farmers throughout the region.</p>	<p>Yes</p> <p>No</p>

<p>① <i>How is this information used?</i></p> <p>If the response to this measure is <i>Yes</i> (relatively large or uniquely catalytic impact on employment), a bonus score of 100 is earned. If the response is <i>No</i> (not a large or uniquely catalytic impact on employment), no bonus score is earned. Documentation to support the claim should be provided. This measure rewards projects that have a significant impact on job creation and retention but does not penalize projects that do not. The scoring accommodates diversity of context. For example, 10 jobs in a town of 5,000 may have a relatively large impact while 10 jobs in a city of 500,000 may not, or a catalytic investment may create few direct jobs but generate a significant number of jobs by expanding the customer base of related businesses. Additional information about this measure can be found in the TBL Tool User’s Guide posted on the TBL Tool website.</p>	<p>If yes, please briefly explain how the project has a large or catalytic impact on employment.</p>
<p>While benefits are an important part of job quality, we understand that benefit information may not be readily available. Please answer this question to the best of your ability and provide your feedback on the workability of this measure in the beta test feedback survey. The following questions pertain to the employee benefits associated with the project’s direct jobs created and/or retained. Benefits associated with construction jobs are addressed in another section.</p> <p>5. What percent of the direct jobs created and/or retained do you anticipate will provide good quality employee benefits (e.g., affordable health insurance, sick days, vacation days, and retirement benefits)? If no employees will be eligible, please enter “0”. If no direct jobs will be created and/or retained, enter NA.</p> <p>① <i>How is this information used?</i></p> <p>The percentage of direct employees of the completed project expected to receive good quality benefits is entered. Good quality benefits refer to the type of benefits (e.g., health coverage for employee and family, sick days and personal days, vacation days, retirement), as well as the accessibility and affordability of the coverage (e.g., employee contributions, co-pays). The percent entered is the score. The score is NA if no direct jobs.</p> <p>Along with good wages, employee benefits are an important aspect of job quality. Good quality benefits can foster workforce health and productivity, reduce financial burdens on taxpayers, and contribute to the attraction and retention of skilled workers. Additional information about this measure can be found in the TBL Tool User’s Guide posted on the TBL Tool website.</p>	<p>% _____</p>
<p>6. Will the project have tenants (e.g., retail, office, business park, business incubator)?</p> <p>If answer is Yes, then following question appears.</p>	<p>Yes No</p>
<p>6.a. Will incentives be provided to tenants that offer good quality employee benefits (e.g., affordable health insurance, sick days, vacation days, retirement benefits)?</p> <p>① <i>How is this information used?</i></p> <p>In many cases, direct permanent jobs are created by a tenant at the project location rather than directly by the facility owner (e.g., owner of office building or shopping center). In these cases, while the project owners do not control the amount or type of employee benefits provided, they may provide incentives to tenants to encourage the provision of quality benefit programs. A bonus score of 100 is provided when investments with tenants provide incentives for tenant provision of benefits. If tenant incentives are not offered or if this information is not known, there is no impact on the project score.</p>	<p>Yes No Don’t Know</p>

<p>The next few questions address agreements or programs to support employment access and advancement for the direct jobs created and/or retained for this project. Opportunities associated with construction jobs are addressed in another section.</p>	
<p>7. Which of the following statements regarding equity and opportunity hiring goals for direct jobs created and/or retained <i>best</i> applies to your project? Select one of the options below.</p> <p>① <i>How is this information used?</i></p> <p>This measure considers the availability of career access and advancement opportunities that allow traditionally disadvantaged and underutilized members of society to build skills and contribute productively to society. Depending upon the community, these populations may include people of color, veterans, disabled individuals, women, and individuals re-entering society from the justice system.</p> <p>Hiring goals and performance monitoring (i.e., tracking baseline information, effort, requests and considerations, and results) can facilitate improvements in employment access and advancement by defining desired outcomes and tracking progress. A range of strategies may be applied, including first source hiring agreements that provide target populations with effective notice of available positions along with exclusive consideration for a specific time period prior to open hiring. Well-designed and executed strategies can positively address barriers to employment entry and advancement. Hiring goals should be defined with relevant community and agency input in order to ensure that they respond to the unique context of the place and project.</p> <p>This measure considers whether agreements will be in place to collaborate with relevant workforce development and/or community-based organizations to define hiring targets appropriate to the area’s population and to monitor performance. The parties to the agreement may vary with context and could include, for example, the developer and a community group, workforce agency, or funder.</p> <p>A project earns 100 points if binding agreements will be in place, 50 points if non-binding agreements will be in place, and 0 points if no agreement will be in place. Additional points are provided for the presence of binding agreements because they provide a higher degree of accountability.</p>	
<p><input type="radio"/> There will be a binding agreement to collaborate with relevant workforce development and/or community-based organizations to define hiring targets that are appropriate to the area’s population and monitor performance (i.e., tracking baseline information, effort, requests and considerations, and results).</p>	<p>Please identify primary partner organization(s).</p>
<p><input type="radio"/> There will be a non-binding agreement to collaborate with relevant workforce development and/or community-based organizations to define hiring targets appropriate to the area’s population and monitor performance (i.e., tracking baseline information, effort, requests and considerations, and results).</p>	<p>Please identify primary partner organization(s).</p>
<p><input type="radio"/> There will be no agreement to collaborate with relevant workforce development and/or community-based organizations to define hiring targets appropriate to the area’s population and monitor performance (i.e., tracking baseline information, effort, requests and considerations, and results).</p>	
<p><input type="radio"/> Not applicable - There will be no direct jobs created and/or retained.</p>	

<p>8. Which of the following statements regarding recruitment, training, and placement partnerships for direct jobs created and/or retained <i>best</i> applies to your project? Please select one of the response options below.</p> <p>① <i>How is this information used?</i> Improvements in employment access and advancement are facilitated when appropriate recruitment, training, and placement activities are in place. Outreach, intake, screening, and referral are more likely to be effective if they are tailored to the target audience and delivered through an organization with a proven track record demonstrating that they have the trust and skills necessary to successfully work with the target population.</p> <p>This measure considers whether agreements will be in place to partner with relevant community-based and/or public organizations to conduct recruitment, training, and placement appropriate to the defined target populations (e.g., cultural competency, success training and placing traditionally disadvantaged or underutilized populations). The parties to the agreement may vary with context and could include, for example, the developer and a community group, workforce agency, or funder. A project earns 100 points if binding agreements will be in place, 50 points if non-binding agreements will be in place, and 0 points if no agreement will be in place. Additional points are provided for the presence of binding agreements because this provides a higher degree of accountability.</p>	
<p><input type="radio"/> There will be a binding agreement to partner with relevant community-based and/or public organizations to conduct recruitment, training, and placement appropriate to the defined target populations (e.g., cultural competency, success training and placing traditionally disadvantaged or underutilized populations).</p>	Please identify primary partner organization(s).
<p><input type="radio"/> There will be a non-binding agreement to partner with relevant community-based and/or public organizations to conduct recruitment, training, and placement appropriate to the defined target populations (e.g., cultural competency, success training and placing traditionally disadvantaged or underutilized populations).</p>	Please identify primary partner organization(s).
<p><input type="radio"/> There will be no agreement to partner with relevant community-based and/or public organizations to conduct recruitment, training, and placement appropriate to the defined target populations (e.g., cultural competency, success training and placing traditionally disadvantaged or underutilized populations).</p>	
<p><input type="radio"/> Not applicable - There will be no direct jobs created and/or retained.</p>	
<p>9. Which of the following statements regarding professional development for direct jobs created and/or retained <i>best</i> applies to your project? Select one response option from the list below.</p> <p>① <i>How is this information used?</i> Career development requires both access and advancement opportunities. Investments in continuing education help individuals build skills necessary for advancement while increasing their contribution to organizational productivity and competitiveness.</p> <p>This measure considers whether agreements will be in place to provide professional development and training opportunities to employees. Examples of continuing education investments include partnerships with higher education institutions to facilitate</p>	

<p>skills development, on-going skills training on the job, and contributions toward continuing education (e.g., workshops, seminars, courses). The parties to the agreement may vary with context and could include, for example, the developer and a community group, workforce agency, or funder. A project earns 100 points if binding agreements will be in place, 50 points if non-binding agreements will be in place, and 0 points if no agreement will be in place. Additional points are provided for the presence of binding agreements because this provides a higher degree of accountability.</p>	
<p><input type="radio"/> There will be a binding agreement to provide professional development and training on the job and/or through payment or reimbursement for continuing education (e.g., workshops, seminars, courses).</p>	
<p><input type="radio"/> There will be a non-binding agreement to provide professional development and training on the job and/or through payment or reimbursement for continuing education (e.g., workshops, seminars, courses).</p>	
<p><input type="radio"/> There will be no agreement to provide professional development and training on the job and/or through payment or reimbursement for continuing education (e.g., workshops, seminars, courses).</p>	
<p><input type="radio"/> Not applicable - There will be no direct jobs created and/or retained.</p>	
<p>10. Which of the following statements regarding partnership with underrepresented businesses <i>best</i> applies to your project's direct jobs created and/or retained? Select one response from the options below.</p> <p>① <i>How is this information used?</i> Opportunities to start and grow successful businesses have not always been open to all members of society, with barriers including exclusion from networks and capital necessary to compete. This measure aims to ensure that entrepreneurial talent can thrive and that diverse community members can successfully compete for business. Expanding business opportunity to underrepresented populations requires more than posting a public notice. Successful strategies are tailored to the community, building upon proven programs to utilize, mentor, contract with, or partner with underutilized businesses.</p> <p>This measure considers whether agreements will be in place to utilize, mentor, or partner with underutilized businesses. The parties to the agreement may vary with context and could include, for example, the developer and a community group, workforce agency, or funder. A project earns 100 points if binding agreements will be in place, 50 points if non-binding agreements will be in place, and 0 points if no agreement will be in place. Additional points are provided for the presence of binding agreements because this provides a higher degree of accountability.</p>	
<p><input type="radio"/> There will be a binding agreement to utilize, mentor, or partner with underutilized business(es).</p>	
<p><input type="radio"/> There will be a non-binding agreement to utilize, mentor, or partner with underutilized business(es).</p>	
<p><input type="radio"/> There will be no agreement to utilize, mentor, or partner with underutilized business(es).</p>	
<p><input type="radio"/> Not applicable - There will be no direct jobs created and/or retained.</p>	



<p>11. What percent of the project’s direct jobs will produce green products or services? Green products and services include those that create energy from renewable sources; improve energy efficiency; reduce or remove pollution, waste, or greenhouse gases; focus on natural resource conservation (including organic agriculture and sustainable forestry); and/or increase environmental compliance, education or training. If none of the project’s direct jobs produce green products or services, enter “0.” Additional details can be found below and on the Bureau of Labor website (http://www.bls.gov/green/).</p> <p>① <i>How is this information used?</i></p> <p>Goods and services that are designed to improve environmental quality, resource efficiency, and energy independence align job creation with natural resource stewardship in a unique way: not only are environmentally sensitive practices employed, the products themselves facilitate transition to a more sustainable future.</p> <p>Projects earn bonus points if some or all of the jobs created and/or retained pertain to one or more of the five green job categories defined by the United States Bureau of Labor Statistics (http://www.bls.gov/green/). A project earns 100 bonus points if the percent of jobs pertaining to green goods or services is 76 to 100 and 75 bonus points if the percent of jobs is 1 to 75. The scoring system is designed to accommodate diversity of project scale (e.g., 50% of 10 jobs versus 10% of 500 jobs) and to ensure that the bonus points do not move a project out of the highest scoring quartile (i.e., 75 bonus points is the minimum). This is a bonus point measure and projects whose jobs are not associated with green products or services are not penalized. As defined by the Bureau of Labor (http://www.bls.gov/green/#definition), green jobs are associated with the production of green goods and services and include:</p> <ul style="list-style-type: none"> • <i>Energy from renewable sources.</i> Electricity, heat, or fuel generated from renewable sources. These energy sources include wind, biomass, geothermal, solar, ocean, hydropower, and landfill gas and municipal solid waste. • <i>Energy efficiency.</i> Products and services that improve energy efficiency. Included in this group are energy-efficient equipment, appliances, buildings, and vehicles, as well as products and services that improve the energy efficiency of buildings and the efficiency of energy storage and distribution, such as Smart Grid technologies. • <i>Pollution reduction and removal, greenhouse gas reduction, and recycling and reuse.</i> These are products and services that: <ul style="list-style-type: none"> ○ Reduce or eliminate the creation or release of pollutants or toxic compounds, or remove pollutants or hazardous waste from the environment. ○ Reduce greenhouse gas emissions through methods other than renewable energy generation and energy efficiency, such as electricity generated from nuclear sources. ○ Reduce or eliminate the creation of waste materials; collect, reuse, remanufacture, recycle, or compost waste materials or wastewater. • <i>Natural resources conservation.</i> Products and services that conserve natural resources. Included in this group are products and services related to organic agriculture and sustainable forestry; land management; soil, water, or wildlife conservation; and stormwater management. • <i>Environmental compliance, education and training, and public awareness.</i> These are products and services that: <ul style="list-style-type: none"> ○ Enforce environmental regulations. ○ Provide education and training related to green technologies and practices. ○ Increase public awareness of environmental issues. 	<p>%_____</p> <p>Don’t Know Please briefly describe the green product or service.</p>
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Construction Jobs	
12. Will construction trade workers be employed as part of this project? <i>If answer is Yes, then the following questions appear.</i>	Yes No
<p>12.a. What will be the total construction hours for the project?</p> <p>① <i>How is this information used?</i> Information regarding construction jobs is reported in order to provide a sense of expected impact. The information is not included in the project's TBL score because there is no standard for defining a "good" or "bad" number of jobs created and retained. The number of direct construction labor hours is entered. Construction jobs reported as full-time equivalent (FTE) can be converted by multiplying the FTE by 2,080 (full time hours per year). For example, 50 FTE construction jobs that will last one year are equal to 104,000 construction hours.</p>	_____ hours Don't Know
<p>12.b. Will the project include a legally binding agreement to properly classify construction employees and make certified payroll records available to a public entity or advisory body?</p> <p>① <i>How is this information used?</i> This measure considers whether workers will be properly classified as employees and certified payroll records will be available to a public entity or advisory body. A project earns 100 points if a binding agreement will be in place and 0 points if no agreement will be in place. This measure does not apply if there are no construction jobs/hours for the project. Proper classification of workers as employees promotes fair competition and ensures that payroll taxes, worker's compensation and other state- and federally-required funds are paid. When workers are misclassified as independent contractors rather than employees, contractors can unfairly compete by producing low bids achieved by passing costs on to workers and society at large. Making certified payroll records available is an important mechanism for demonstrating that workers are not misclassified as independent contractors or improperly paid.</p>	Yes No
<p>12.c. Will there be a legally binding agreement to pay state defined prevailing wage rates for the trade or, where appropriate, "like pay" for the trade in the benefit area? Like pay refers to the average pay for the trade in the project area and may be an appropriate substitute for prevailing wage if the survey area establishing prevailing wage does not adequately reflect the project context (e.g., a rural project with wages set at a metro level).</p> <p>① <i>How is this information used?</i> This measure considers whether there will be a legally binding agreement to pay state defined prevailing wage rates for the trade or, where appropriate, "like pay" for the trade in the benefit area. Like pay refers to the average pay for the trade in the project area and may be an appropriate substitute for prevailing wage if the survey area establishing prevailing wage does not adequately reflect the project context (e.g., a rural project with prevailing wages set at a metro level). A project earns 100 points if a binding agreement will be in place and 0 points if no agreement will be in place. This measure does not apply if there are no construction jobs/hours for the project. Prevailing wage standards establish a baseline for wages and benefits in construction that are unique to specific geographic locations. Prevailing wage is typically determined by conducting a survey of contractors and is usually set as either the median or modal package of wages and benefits. Prevailing wage requirements help reduce unfair bidding based on undercutting of standard wage and benefit packages in the region.</p>	Yes No

<p>12.d. Will the project include a legally binding agreement to provide health insurance benefit options to construction employees?</p> <p>① <i>How is this information used?</i> This measure considers whether the project will include a legally binding agreement to provide health insurance benefit options to construction employees. Health benefits may be delivered through direct coverage of the employee by the employer (e.g., health insurance), coverage of the employee through employer contribution to a trade association (e.g., payment into benefit program offered by trade association), or as a supplemental or discretionary benefit (e.g., payments to health savings account, extra pay in lieu of coverage). A project earns 100 points if a binding agreement will be in place and 0 points if no agreement will be in place. T</p> <p>This measure does not apply if there are no construction jobs/hours for the project. Working families without health insurance are vulnerable to financial devastation when illness or injury strikes. In addition, tax payers and health care providers incur greater costs as they are left to pay the bills of the uninsured. Further, lost productivity or training costs for new workers can result when preventable or treatable illness impact workers' ability to perform or remain on the job.</p>	<p>Yes</p> <p>No</p>
<p>12.e. Will the project include a legally binding agreement to provide retirement benefits to construction employees?</p> <p>① <i>How is this information used?</i> This measure considers whether the project will include a legally binding agreement to provide retirement benefit options to construction employees. Retirement benefits may be delivered through direct coverage of the employee by the employer (e.g., health insurance), coverage of the employee through employer contribution to a trade association (e.g., payment into benefit program offered by trade association), or as a supplemental or discretionary benefit (e.g., extra pay in lieu of coverage). A project earns 100 points if a binding agreement will be in place and 0 points if no agreement will be in place. This measure does not apply if there are no construction jobs/hours for the project.</p>	<p>Yes</p> <p>No</p>
<p>12.f. Will the project include legally binding agreement to provide minimum 10 hour OSHA compliant safety training for all workers and 30 hour training for all supervisors?</p> <p>① <i>How is this information used?</i> OSHA compliant safety training is standard practice for a high-quality business. Workers who go through registered apprenticeship programs typically receive this training, which is designed to increase safety on the job and decrease work-related injuries and fatalities.</p> <p>This measure considers whether the project will include a legally binding agreement to ensure that all workers have participated in OSHA compliant 10-hour safety training, and that supervisors have received the OSHA compliant 30-hour training. A project earns 100 points if a binding agreement will be in place and 0 points if no agreement will be in place. This measure does not apply if there are no construction jobs/hours for the project.</p>	<p>Yes</p> <p>No</p>

<p>12.g. Will a Project Labor Agreement applicable to union and non-union workers be in place?</p> <p>① <i>How is this information used?</i> Project labor agreements establish key labor and management terms for a specific project. In general, project labor agreements (PLAs) address wages, hours, working conditions and procedures for resolving disputes, including agreements that restrict strikes or lock-outs. PLAs create a comprehensive framework that sets the terms for a project and requires all contractors and sub-contractors on the project to comply with the standards. The PLA can be inclusive of union and non-union workers. While responsible contracting standards may address issues such as wages and benefits that is not always the case. PLAs are distinctive because they are established and implemented in consultation with worker organizations. This helps to ensure that workers' perspectives are considered and provides standing to verify and enforce agreements.</p> <p>This measure considers whether a project labor agreement will be in place. For projects whose total cost is less than \$10 million, a project earns 100 bonus points if a project labor agreement will be in place and 0 bonus points if no agreement will be in place (total score not affected if no PLA will be in place). For projects whose total costs are \$10 million or more, 100 points are earned if a project labor agreement will be in place and 0 bonus points are earned if no agreement will be in place. This measure does not apply if there are no construction jobs/hours for the project.</p>	<p>Yes</p> <p>No</p>
<p>12.h Will the contractor be a registered apprentice or training program participant?</p> <p>① <i>How is this information used?</i> Apprenticeship programs are essential for building workforce skills and capacity. Registered apprenticeship programs are regulated by federal and state governments and are required to meet industry standards for graduating workers who can obtain employment in their field of training. Not all apprenticeship programs are registered, so contractors should provide documentation that they participate in a recognized program.</p> <p>This measure considers whether the contractor will be a registered apprentice program or training participant. A project earns 100 points if they will be and 0 points are earned if they will not be. The measure is not applied if the investment does not include any construction activity.</p>	<p>Yes</p> <p>No</p>
<p>12.i Will the contractor have a binding agreement in place to meet or exceed the minimum recommended apprentice utilization levels within legal maximums (percent of total hours or workforce as recommended by federal or state law)?</p> <p>① <i>How is this information used?</i> Apprenticeship training programs typically require a combination of classroom and on-the-job training. In addition to contributing funds to apprenticeship training, contractors need to hire apprentices so that apprentices receive the experience necessary to graduate and move into full employment. At the same time, apprentices are paid less than the journeyman wage rate: in order to ensure quality performance and prevent labor abuses, federal and state regulations specify maximum apprentice utilization. This sub-measure considers whether a binding agreement will be in place to utilize apprentices to the maximum ratios allowed by state or federal regulations. A project earns 100 points if there will be such an agreement and 0 points if there will not be. The sub-measure is not applied if an investment does not include any construction activity.</p>	<p>Yes</p> <p>No</p>

<p>12 j. Which of the following statements regarding equity and opportunity non-apprentice hiring goals <i>best</i> applies to your project? Select one of the responses below.</p> <p>① <i>How is this information used?</i></p> <p>Hiring goals that are well defined and executed can facilitate access to construction trade employment by traditionally disadvantaged and underutilized populations. Hiring goals should be defined with relevant community and agency input in order to ensure that the goals respond to the unique context of the community and project. Outreach and recruitment efforts should be tailored to effectively reach the target population(s), and progress toward access and advancement goals monitored over time.</p> <p>This measure considers whether agreements will be in place to have a minimum percent of non-apprentice construction employment hours performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals or formerly incarcerated individuals). A project earns 100, 75, 50, or 0 points depending upon the level of commitment: 100 points for a binding agreement to have a minimum of 30% of <i>non-apprentice construction employment</i> hours performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations; 75 points if the binding agreement is for a minimum of 20% of non-apprentice construction employment hours; 50 points if the agreement is non-binding; and 0 points if no agreement will be made. The measure is not applied if the investment does not include any construction activity.</p>	
<p><input type="radio"/> There will be a binding agreement that a minimum of 30% of <i>non-apprentice construction employment</i> hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals and formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be a binding agreement that a minimum of 20% of <i>non-apprentice construction employment</i> hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals and formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be a non-binding agreement that a minimum of 20% of <i>non-apprentice construction employment</i> hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals and formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be no agreement to have a minimum of 20% of <i>non-apprentice construction employment</i> hours performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals and formerly incarcerated individuals).</p>	

<p>12.k. Which of the following statements regarding equity and opportunity in apprenticeship hiring <i>best</i> applies to your project? Select one of the responses below.</p> <p>① <i>How is this information used?</i></p> <p>Commitments to hire apprentices from traditionally disadvantaged and underutilized populations help to facilitate access to construction trade employment. Hiring goals should be defined with relevant community and agency input in order to ensure that they respond to the unique context of the community and project.</p> <p>This measure considers whether an agreement will be in place to have a have a minimum percent of construction apprentice hours performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals or formerly incarcerated individuals). A project earns bonus points depending upon the level of commitment to equity and opportunity apprentice hiring.</p> <p>The points are awarded as a bonus so that projects are not penalized if the pool of available apprentices does not include the target population. Projects earn 100 bonus points for a binding agreement to have a minimum of 30% of <i>apprentice construction employment</i> hours performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations; 75 bonus points if the binding agreement is for a minimum of 20% of apprentice construction employment hours; 50 bonus points if the agreement is non-binding; and 0 points if no agreements will be made. The measure is not applied if the investment does not include any construction activity.</p>	
<p><input type="radio"/> There will be a binding agreement that a minimum of 30% of apprentice hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled, or formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be a binding agreement that a minimum of 20% of apprentice hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled, or formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be a non-binding agreement that a minimum of 20% of apprentice hours will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled, or formerly incarcerated individuals).</p>	
<p><input type="radio"/> There will be no agreement regarding minimum apprentice hours to be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals and formerly incarcerated individuals).</p>	

<p>12.I. Which of the following statements regarding equity and opportunity for under-represented businesses <i>best</i> applies to your project? Select one response from the options below.</p> <p>① <i>How is this information used?</i> Inclusive strategies that support participation of under-represented businesses in project construction contracts include culturally competent outreach, as well as targeted assistance with barriers to participation (e.g., forms, bonding, insurance).</p> <p>This measure considers whether an agreement will be in place to utilize, mentor, partner or otherwise support participation of under-represented businesses in project construction contracts. A project earns 100 points if a binding agreement will be in place, 50 points if a non-binding agreement will be in place, and 0 points if no agreement will be in place. The measure is not applied if the investment does not include any construction activity.</p>	
<p><input type="radio"/> There will be a binding agreement to utilize, mentor, partner or otherwise support participation of under-represented businesses in project construction contracts.</p>	
<p><input type="radio"/> There will be a non-binding agreement to utilize, mentor, partner or otherwise support participation of under-represented businesses in project construction contracts.</p>	
<p><input type="radio"/> There will be no agreements in place to utilize, mentor, partner or otherwise support participation of under-represented businesses in project construction contracts.</p>	

C. CONSTRUCTION AND OPERATIONS	Answer Options
<p>This section pertains to construction and operation of the project.</p>	
<p>3. Which of the following statements regarding building and construction is most applicable to your project? Select one response from the options below.</p> <p>① <i>How is this information used?</i> Green building practices can positively impact the triple bottom line through energy cost savings, increased building value, higher occupant satisfaction and productivity, and lower natural resource and human health impacts.</p> <p>This measure considers whether green building practices will be applied in new construction as well as remodels or upgrades. A project earns 100, 75, 50, or 0 points depending upon the level of commitment to green building and construction. Maximum points are provided if the project will receive third party certification by a recognized international, national, or regional program for green construction (e.g., LEED, Living Building Challenge, Green Globes, EarthCraft, Earth Advantage, and GreenLITES). Third party certification is valuable because it provides a common standard for accepting and verifying claims buildings and infrastructure can be green without certification. Seventy-five points are earned if the applicant can demonstrate that plans are in place to build to third party standards although without certification. Fifty points are provided if the project will employ some green building features such as water or energy conservation, but will not design and build to a recognized third party standard. No points are earned if there are not documented commitments to green building.</p>	

<input type="radio"/> The project will receive third party certification by an appropriately recognized international, national, or regional program for green building and/or infrastructure (e.g., LEED, BREEAM, Earth Advantage, Green Globes, GreenLITES, or a government green building standard).	Please identify the certification or standard program.
<input type="radio"/> The project will be designed and built to the standards of an appropriately recognized international, national, or regional third party certification program for green building and/or infrastructure (e.g., LEED, BREEAM, Earth Advantage, Green Globes, GreenLITES, or a government green building standard) but will not secure third party certification.	Please identify the certification or standard program.
<input type="radio"/> The project will incorporate green building features such as energy and water conservation but will not be designed and built to third party certification standards.	
<input type="radio"/> The project will not document commitments to green building and construction.	
<input type="radio"/> The project does not involve any building or construction.	
<p>4. Does the project make use of an existing structure (e.g., reuse/remodel rather than new construction)?</p> <p>① <i>How is this information used?</i> Reuse of existing facilities can provide a number of environmental benefits depending upon the type of project and materials used. Environmental benefits associated with rebuilding rather than razing facilities include savings in energy, material, land conversion, and carbon emissions. This measure does not affect the project score when facility reuse is not an applicable or appropriate option. Where it does apply, this measure assigns a bonus score of 100 points to projects that make use of an existing structure.</p>	<p>Yes</p> <p>No</p> <p>NA - project does not involve any building or construction.</p>
<p>5. Which of the following statements regarding low impact and sustainable site design apply to your project? Select one of the responses below.</p> <p>① <i>How is this information used?</i> Site design exerts a powerful influence over economic, environmental, and social impacts of a project. These include, for example, groundwater recharge, flood control, habitat conservation, increased recreation opportunities, and reduced maintenance costs. Sustainable site design works with nature to ensure that beauty and accessibility are maximized, while long term costs associated with site development are minimized.</p> <p>This measure considers whether the project aligns with recognized sustainable site design standards, certifications, or best practices. A project earns 100, 75, 50, or 0 points depending upon the level of commitment to sustainable site design. Maximum points are earned if the project will receive third party certification by a recognized international, national, or regional program (e.g., Sustainable Sites, LEED-ND, One Planet Communities). Third party certification is valuable because it provides a common standard for accepting and verifying claims. Seventy-five points are earned if the applicant can demonstrate that plans are in place to build to best practices or third party standards although without certification. Fifty points are provided if the project will incorporate low impact or sustainable site design features but will not be designed and built to the standards of a recognized international, national, or regional program.</p>	

<p>If the project will receive certification by a program that addresses both site design and construction, simply answer the questions appropriate to the respective measure (i.e., a project is not expected to secure separate or redundant certifications).</p>	
<p><input type="radio"/> The project will receive third party certification by an appropriately recognized international, national, or regional sustainable site design or low impact development program (e.g., ASLA Sustainable Sites, LEED-ND, One Planet Communities).</p>	<p>Please identify the certification or standard program.</p>
<p><input type="radio"/> The project will design and build to the standards of an appropriately recognized international, national, or regional sustainable site design or low impact development program but will not secure third party certification.</p>	<p>Please identify the certification or standard program.</p>
<p><input type="radio"/> The project will incorporate low impact or sustainable site design features but does will not be designed and built to the standards of a recognized international, national, or regional program.</p>	
<p><input type="radio"/> The project will not document commitments to sustainable site design.</p>	
<p><input type="radio"/> The project involves no site planning or design of any kind.</p>	
<p>6. The investment is designed to improve walkability, bikability, and/or transit accessibility (e.g., a mixed use development that contributes to community completeness, provision of retail services within ¼ mile of housing, addition of transit or bike lanes to area).</p> <p>① <i>How is this information used?</i> Locations that are easy to access by walking, bicycling, or transit may accrue significant financial, health and environmental benefits.</p> <p>This measure considers whether the investment is designed to improve walkability, bikability, and/or transit accessibility (e.g., a mixed use development that contributes to community completeness, provision of retail services within ¼ mile of housing, or addition of transit or bike lane to area). Projects that are designed to increase walking, biking, or transit options earn 100 bonus points. If the project does not, this bonus measure does not apply and the project score is not affected.</p>	<p>Yes</p> <p>No</p> <p>DK</p> <p>If yes, please briefly explain.</p>
<p>7. Does the project remediate a brownfield site and/or provide habitat restoration? If answer is Yes, then following question appears.</p> <p>① <i>How is this information used?</i> Remediation of abandoned or contaminated sites can increase property values and tax revenues while reducing health costs, and restoration of natural resources (e.g., wetlands, forestlands, rivers, or farmlands) can deliver valuable ecosystem services such as flood control, wildlife habitat, and scenic amenities.</p> <p>A bonus score of 100 is earned if the project contributes to land or habitat remediation or restoration. The site may or may not be classified as a brownfield, and restoration and remediation activities are defined broadly including farmland for food production, reforestation and afforestation, and de-paving. Projects that do not include remediation or restoration are not penalized, as this is a bonus measure.</p>	<p>Yes</p> <p>No</p> <p>DK</p>

<p>5.a. How many acres will be remediated/restored as part of this project? Please round to the nearest quarter of an acre.</p> <p>① <i>How is this information used?</i> This information is provided for informational purposes only and does not affect the project score</p>	<p>_____acres Don't Know</p>
<p>The following questions provide information on the operation and maintenance practices for this project.</p>	
<p>8. Will on-going building performance be monitored through participation in the Energy Star Energy Management program? (http://www.energystar.gov/index.cfm?c=assess_performance.assess_performance_index)</p> <p>① <i>How is this information used?</i> Efficient use of energy resources can contribute to the triple bottom line by producing cost savings, conserving natural resources, and improving occupant comfort.</p> <p>This measure considers whether an on-going strategy is in place to monitor and improve energy use. A project earns 100 points for participating in the Energy Star Energy Management Program. This is a no cost program that assists organizations to improve the energy performance of their facilities. A project does not earn points for this measure without participation in the Energy Star Energy Management Program. Information about the program can be found at http://www.energystar.gov/index.cfm?c=business.bus_commit.</p>	<p>Yes, No, NA</p> <p>If NA, please explain.</p>
<p>9. Does the project include strategies to achieve lower water use than is the norm for the project industry or industries (e.g., a chip manufacturer incorporates a water recycling process that results in less water use than the industry norm)? Building features such as low-flow bathroom appliances are not addressed here; they are addressed in the green building measure above.</p> <p>① <i>How is this information used?</i> Industrial processes that are designed to minimize water use may lower operating costs while conserving an essential non-renewable resource. Conservation can be particularly important in areas that are facing water shortages and/or in industries that have high water usage. This measure rewards excellence in water conserving design. The focus of this measure is on industrial processes (e.g., water recycling in chip manufacturing) rather than building features (e.g., low-flow bathroom appliances), which are addressed in the green building measure.</p> <p>Projects may earn 100 bonus points if strategies will be implemented that lead to lower water use than is the norm for the industry. While any project can benefit from this measure, it may be particularly helpful to projects whose industry or industries were identified as higher than average water users in the industry eco-efficiency measure.</p>	<p>Yes, No DK</p> <p>If yes, please briefly explain.</p>
<p>10. Does the project include strategies to produce less toxic emissions to air, water, or land than is the norm for the project industry or industries (e.g., use of a non-toxic alternative to industry standard)?</p> <p>① <i>How is this information used?</i> Industrial processes that are designed to minimize toxic emissions to air, land, or water may benefit human health and maintain essential ecosystem services. Economic benefit may also accrue through reduced costs and/or the development of valuable new products and processes.</p>	<p>Yes, No DK</p> <p>If yes, please briefly</p>

<p>Projects may earn 100 bonus points if strategies are implemented that lead to lower than average emissions. While any project can benefit from this measure, it may be particularly helpful to projects whose industry or industries were identified as generating higher than average emissions in the industry eco-efficiency measure.</p>	<p>explain.</p>
<p>11. Will demand management or trip reduction strategies be put in place to reduce automobile trips associated with employee and/or customer commuting (e.g., telecommuting, transit passes, shuttles, bicycle facilities and locker rooms)?</p> <p>① <i>How is this information used?</i> Reductions in automobile trips associated with employee and/or customer commuting can improve air quality, while reducing fuel use and traffic congestions – all of which have significant human and financial costs. Further, active transportation options have the added benefit of improving health outcomes and reducing travel expenses.</p> <p>This measure considers whether appropriate vehicle trip reduction strategies are in place. A project earns 100 points if strategies will be in place to reduce automobile trips associated with employee and/or customer commuting (e.g., telecommuting, transit passes, shuttles, bicycle facilities and locker rooms). Appropriate strategies will depend upon the location and type of industry and may include options such as telecommuting, transit passes, shuttles, bicycle facilities and locker rooms. A project does not earn points for this measure if there will not be a trip reduction strategy in place.</p>	<p>Yes</p> <p>No</p> <p>DK</p> <p>If NA, please briefly explain.</p>
<p>12. Will operations be compliant with certifications or standards for industry best environmental practices (e.g., green tourism, IT, forestry, agriculture/food production)?</p> <p>① <i>How is this information used?</i> A number of industries have developed certifications or best practices for environmental performance. When based on leading scientific evidence and stakeholder input, such standards can be an effective tool for improving industry performance.</p> <p>Projects earn 100 bonus points if they demonstrate that the project will be compliant with best practices for their industry (e.g., forestry, information technology, tourism, sustainable agriculture and food production, infrastructure).</p>	<p>Yes</p> <p>No</p> <p>Don't Know</p> <p>NA (none available)</p> <p>Please identify the certification or standard program.</p>
<p>13. Which of the following statements regarding renewable energy use best applies to this project? Check one of the responses below.</p> <p>① <i>How is this information used?</i> Energy supplies that come from renewable sources (e.g., biomass, wind, solar, hydropower and geothermal) can contribute to the triple bottom line by creating jobs, keeping dollars local, and providing lower environmental impact energy choices.</p> <p>This measure considers whether a portion of the project's energy will be derived from renewable energy sources. A project earns 100 points if a portion of the project's energy supply will be derived from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates, or on-site</p>	

<p>generation sources AND the project will participate in the US Green Power Partnership Program (http://www.epa.gov/greenpower/). The portion of green power is defined as 3-20%, depending upon the size of organization. Eligible green power sources include solar, wind, geothermal, biogas, eligible biomass, and eligible low impact hydroelectric sources. Commitments can met with any combination of green power products (i.e., green power, renewable energy certificates, or on-site generation).</p> <p>A project earns 75 points if a portion of the project’s energy supply will come from renewable energy resources but the project will not participate in the US Green Power Partnership. No points are earned if no commitments to renewable energy will be made.</p>	
<p><input type="radio"/> A portion of the project’s energy supply will come from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates, or on-site generation sources AND the project will participate in the US Green Power Partnership Program (http://www.epa.gov/greenpower/).</p>	<p>Please list the percent of energy provided by renewable resources.</p>
<p><input type="radio"/> A portion of the project’s energy supply will come from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates, or on-site generation sources, however, the project will NOT participate in the US Green Power Partnership Program (http://www.epa.gov/greenpower/).</p>	<p>Please list the percent of energy provided by renewable resources.</p>
<p><input type="radio"/> No commitments to renewable energy have been made.</p>	
<p>If answer to Industry, Jobs and Wages is yes, then the following questions 12 and 13 will appear:</p>	
<p>14. Will the building owner require, incentivize, or encourage tenants/occupants to meet best practices in green operations and management?</p> <p>① <i>How is this information used?</i></p> <p>Building owners can encourage environmental stewardship in tenant operations and management in a number of ways. For example, lease incentives may be offered for things like reduced waste or green business certification, or occupancy agreements may establish protocols such as non-toxic cleaning and landscaping products. Incentives can be a powerful way to encourage preferred practices and may serve as an asset if the stewardship commitments differentiate the product in the marketplace.</p> <p>For projects with tenants, 100 bonus points are earned if the owner will require, incentivize, or encourage tenants/occupants to meet best practices in green operations and management. For projects without tenants, this measure does not apply and the project score is not affected. Incentives for tenant use of green energy are addressed in the question below.</p>	<p>Yes</p> <p>No</p>

<p>15. Which of the following statements best describes tenant incentives to participate in renewable energy programs? Select one of the responses below.</p> <p>① <i>How is this information used?</i></p> <p>Energy supplies that come from renewable sources (e.g., biomass, wind, solar, hydropower and geothermal) can contribute to the triple bottom line by creating jobs, keeping dollars local, and providing lower environmental impact energy choices. This measure considers whether a portion of the project’s energy will be derived from renewable energy sources.</p> <p>For projects with tenants, 100 points are earned if the owner will require tenants to participate in the US Green Power Partnership Program, 75 points if the owner will incentivize tenants to participate in the US Green Power Partnership Program, and 0 points if there will be no incentives or requirements to purchase energy from renewable sources. For projects without tenants, the measure is not applicable and does not impact the project score.</p>	
<p><input type="radio"/> Owner will <i>require</i> tenants to participate in the US Green Power Partnership Program and commit to purchasing a portion of the project’s energy supply from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates, or on-site generation sources (3% to 20% depending upon annual usage). http://www.epa.gov/greenpower/</p>	
<p><input type="radio"/> Owner will <i>incentivize</i> tenants to participate in the US Green Power Partnership Program and commit to purchasing a portion of the project’s energy supply from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates, or on-site generation sources (3% to 20% depending upon annual usage). http://www.epa.gov/greenpower/</p>	
<p><input type="radio"/> There are no incentives or requirements for tenants to purchase energy from renewable resources.</p>	
<p>D. PLACEMAKING AND ACCESSIBILITY</p>	<p>Answer Options</p>
<p>The following questions pertain to the project's impact on cultural and historic resources.</p>	
<p>1. Please select the statement that <i>best</i> represents your project's impact on culturally or historically significant structures, sites, facilities, or districts. Select one of the response options below.</p> <p>① <i>How is this information used?</i></p> <p>Preserving and enhancing cultural and historic resources can contribute to economic vitality by leading to increased property value, tourism receipts, preservation of tradition-based economies, and firm recruitment and retention. In addition, community well-being may be improved if these resources contribute to civic pride, a sense of identity and connection, and well-utilized public space.</p> <p>If the proposed investment will have no impact on culturally or historically significant structures, facilities, or districts then this measure is not applicable and the project score is not affected. The score for this measure is 100 if the investment will preserve or enhance historically or culturally significant structures, facilities, or districts AND meet criteria for inclusion on national, state, or local registry and/or have a letter supporting cultural or historical significance provided by an appropriate historical or cultural commission or agency earn a score of 100. A score of 80 is earned if the investment will preserve or enhance historically or</p>	

culturally significant structures, facilities, or districts but will not meet criteria for inclusion on national, state, or local registry and/or have a letter supporting cultural or historical significance provided by an appropriate historical or cultural commission or agency. Investments that will have a negative impact earn a zero score.	
<input type="radio"/> The investment will preserve or enhance historically or culturally significant <i>structures, facilities, sites, or districts</i> in the community (e.g., historic building conservation, materials or design of new construction consistent with community history/culture, Main Street revitalization program, arts district) and meet criteria for inclusion on national, state, or local registry or receive a letter supporting cultural or historical significance by an appropriate historical or cultural commission or agency.	Please briefly describe.
<input type="radio"/> The investment will preserve or enhance historically or culturally significant <i>structures, facilities, sites, or districts</i> in the community (e.g., historic building conservation, materials or design of new construction consistent with community history/culture, Main Street revitalization program, arts district) but does not meet criteria for inclusion on national, state, or local registry or have a letter supporting cultural or historical significance provided by an appropriate historical or cultural commission or agency.	Please briefly describe.
<input type="radio"/> The project will have no impact on historically or culturally significant <i>structures, facilities, sites, or districts</i> in the community.	
<input type="radio"/> The investment will negatively impact historically or culturally significant <i>structures, facilities, sites, or districts</i> in the community.	Please briefly describe.
<p>2. Please select the statement that <i>best</i> represents your project's impact on culturally or historically significant practices. Select one of the responses below.</p> <p>① <i>How is this information used?</i> Historically or culturally significant practices include traditions, oldways, and unique culture of place. Conserving such practices can be important for place-based economic development, as well as for fostering community identity and pride.</p> <p>If the proposed investment will have no impact on culturally or historically significant practices then this measure is not applicable and the project score is not affected. The score for this measure is 100 if the investment will have a positive impact on culturally or historically significant practices and 0 if the investment will have a negative impact.</p>	
<input type="radio"/> The investment will preserve or enhance historically or culturally significant <i>practices</i> in the community (e.g., contributes to conservation of oldways, traditions, or culture of place, supports the arts).	Please briefly describe.
<input type="radio"/> The project will have no impact on historically or culturally significant <i>practices</i> in the community.	
<input type="radio"/> The investment will negatively impact historically or culturally significant <i>practices</i> in the community (e.g., disruption of oldways, traditions, or culture of place).	Please briefly describe.

<p>3. Please select the statement that <i>best</i> represents your project's impact on culturally or historically significant programming. Select one of the responses below.</p> <p>① <i>How is this information used?</i> Making historically and culturally significant resources accessible to a wide range of community members can contribute to a collective appreciation for heritage and context, and help individuals and communities to understand and interpret experiences.</p> <p>If the proposed investment has no programming element such as performances or activities, this measure is not applicable and the project score is not affected. Investments that include historically or culturally relevant programming earn 100 points if there is a component designed explicitly to serve the community (e.g., connection to schools, discount days). Investments that include programming but without any components designed to serve the community earn 50 points.</p>	
<p><input type="radio"/> The project will include programming (e.g., performances, activities) and has components explicitly designed to serve the community (e.g., connection to schools, discount days).</p>	Please briefly describe.
<p><input type="radio"/> The project will include programming (e.g., performances, activities) but without components explicitly designed to serve the community (e.g., connection to schools, discount days).</p>	Please briefly describe.
<p><input type="radio"/> There is no programming aspect to this project (e.g., the project does not include performances or activities that relate to history or culture).</p>	
<p>4. Please select the statement or statements that <i>best</i> represents your project's impact on public spaces. Examples of public spaces include parks, plazas, trails, gardens, and scenic views. Public spaces may be privately owned but publicly accessible and may be vertical spaces (e.g., rooftop garden). Select one of the responses below.</p> <p>① <i>How is this information used?</i> Well-designed and cared for public spaces are important to economic development because they can attract residents, workers, and visitors. They can add value in numerous ways, such as providing scenic beauty, recreational and gathering opportunities, and environmental benefit. Publicly accessible spaces take a variety of shapes and sizes, and may even be privately owned – from pocket parks and rooftop gardens, to plazas, scenic viewpoints, biking and walking trails.</p> <p>If public space is not impacted (i.e., neither created, enhanced, or diminished) this measure does not apply and the project score is not affected. Investments that create or enhance public space AND have a plan in place to promote productive public use and care of the space earn 100 points (e.g., interpretive signs, marketing campaign, stewardship partnership with neighbors or schools, integration into the surrounding area, uses and activities are designed to create vibrancy and use across day and seasons). Investments that create or enhance public space without a plan to promote productive public use and care of the space earn 100 points. Investments that diminish quality, quantity, or access to public space earn 0 points.</p>	

<input type="radio"/> The investment will create or enhance publicly accessible spaces (e.g., park, trail, plaza, scenic vista) and there will be a plan to promote productive public use and care of the space (e.g., interpretive signs, marketing campaign, stewardship partnership with neighbors or schools, strategies to create vibrancy and use across the day and seasons).	Please briefly describe.
<input type="radio"/> The investment will create or enhance publicly accessible spaces (e.g., park, trail, plaza, scenic vista) but there is no plan to promote productive public use and care of the space.	Please briefly describe.
<input type="radio"/> The investment will neither create, enhance, nor diminish public spaces (e.g., park, trail, plaza, scenic vista).	
<input type="radio"/> The investment will diminish or is likely to diminish public spaces (e.g., park, trail, plaza, or scenic vista).	Please briefly describe.
<p>5. Will any residents and/or businesses be temporarily or permanently relocated as a part of this project? If answer is yes, then following questions should appear.</p> <p>① <i>How is this information used?</i> Businesses or residents that are temporarily or permanently relocated due to an investment may experience higher rents, longer or more expensive commutes, and a loss of important community ties. Impacts of relocation to existing residents and businesses must be carefully considered and appropriate plans made to ensure that relocation does not negatively affect this population. Further, because the burdens of relocation often accrue disproportionately to disadvantaged and underrepresented populations, focused attention needs to be given to these residents and businesses.</p> <p>This question is for informational purposes and identifies whether any residents and/or businesses will be temporarily or permanently relocated as part of the project. This measure has no scoring.</p>	Yes, No
<p>5.a. Will a relocation plan for residents and business that is appropriate to their needs before, during, and after relocation be developed and will the plan include details regarding counseling and support services, opportunities to return, financial assistance for costs associated with relocation, and clear specification of tasks, timelines, responsibilities, performance monitoring, and recourse/consequence?</p> <p>① <i>How is this information used?</i> This measure considers whether a relocation plan appropriate to the needs and interests of residents and businesses before, during, and after relocation will be developed. Details of the relocation plan may include counseling and support services, financial assistance to navigate the costs associated with relocation, opportunities to return, and clear specification of tasks, timelines, responsibilities, performance monitoring, and recourse/consequence. If a relocation plan appropriate to the needs and interests of the community will be in place, the score is 100. If a relocation plan appropriate to the needs and interests of the community will not be in place the score is 0. This measure does not apply if residents and/or businesses will not be temporarily or permanently relocated as part of the project.</p>	Yes No If yes, please identify lead organization(s).

<p>5.b. Is there a plan to meaningfully collaborate with diverse residents and businesses in the area in creating the relocation plan, with a particular focus on underrepresented and disadvantaged populations?</p> <p>① <i>How is this information used?</i> This measure considers how the affected businesses and/or residents are involved in the development of the relocation plan. If there is or will be a plan to meaningfully engage diverse residents and businesses in the area in creating the relocation plan, with a particular focus on underrepresented and disadvantaged populations, the score is 100. If a meaningful plan will not be in place, the score is 0. This measure is not applied if residents and/or businesses will not be temporarily or permanently relocated as part of the project.</p>	<p>Yes</p> <p>No</p> <p>If yes, please identify lead organization(s).</p>
<p>6. Is the cost of living or doing business in the neighborhood surrounding the project likely to increase as a result of this project (i.e., residents and/or businesses may be priced out of the neighborhood or involuntarily displaced)? If yes, the following questions should appear. If no, NA for the following.</p> <p>① <i>How is this information used?</i> Voluntary displacement occurs when individuals or business choose to move from the project area because they perceive that the move will leave them better off. Involuntary or indirect displacement occurs when residents or business move because they can no longer afford to stay in the area. This type of dislocation is similar to the displacement that occurs when residents and businesses are temporarily or permanently relocated as part of the site development and construction, though there are differences in cause and remedy.</p> <p>Residents and businesses that are displaced may experience higher rents, longer or more expensive commutes, and a loss of important community ties. The potential for involuntary or indirect displacement of existing residents and businesses in the project area must be carefully considered and appropriate prevention and mitigation plans implemented.</p> <p>This question is for informational purposes and identifies whether the cost of living or doing business in the neighborhood is likely to increase as a result of this project leading to residents and/or businesses being involuntarily or indirectly displaced. This measure has no scoring.</p>	<p>Yes</p> <p>No</p>
<p>6.a. Will an anti-displacement strategy be created to prevent and mitigate potential displacement of residents and businesses in the surrounding area due to factors such as rising rents and taxes?</p> <p>① <i>How is this information used?</i> This measure considers whether an anti-displacement strategy appropriate to the needs and interests of residents and businesses has been or will be developed. The strategy could include things like assistance with purchasing units, affordability agreements, tax relief, and counseling and skill-building to identify and successfully pursue suitable options. If an appropriate anti-displacement strategy will be in place, the score is 100. If an anti-displacement strategy appropriate to the needs and interests of the community will not be in place, the score is zero. This measure is not applied if the project is not expected to contribute to involuntary or indirect displacement.</p>	<p>Yes</p> <p>No</p> <p>If yes, please identify lead organization(s).</p>

<p>6.b. Is there a plan to meaningfully collaborate with diverse residents and businesses in the area in creating the anti-displacement strategy, with a particular focus on underrepresented and disadvantaged populations?</p> <p>① <i>How is this information used?</i></p> <p>This measure considers whether there is or will be a plan to meaningfully engage diverse residents and businesses in the area in creating the anti-displacement strategy, with a particular focus on underrepresented and disadvantaged populations. If a plan will be in place, the measure score is 100. If an anti-displacement strategy appropriate to the needs and interests of the community will not be in place, then the score is zero. This measure is not applied if the project is not expected to contribute to involuntary or indirect displacement.</p>	<p>Yes</p> <p>No</p> <p>If yes, please identify lead organization(s).</p>
<p>7. Are there restricted affordable housing units on the project site? (i.e., affordability limited under a government contract, deed restriction, or other measure; for example, subsidized housing, tax credit housing, low income housing, public housing, section 8 housing, deed restricted housing). If yes, the following question should be displayed. If no, NA to the following.</p> <p>① <i>How is this information used?</i></p> <p>Affordable housing provides workers of various income levels and family members in various life stages options to remain in the community. When affordable housing units are lost, individuals and families lose the stabilizing foundation of home that is important to thrive. Further, displacement may lead to longer commutes and their associated negative impacts (e.g., pollution, less time for family and community, and reduced competitive disadvantage).</p> <p>This question is for informational purposes and identifies whether restricted affordable housing units exist on the project site. This measure has no score.</p>	<p>Yes</p> <p>No</p>
<p>7.a. Please select the statement that <i>best</i> describes replacement of affordable housing at the project site. Select one of the responses below.</p> <p>① <i>How is this information used?</i></p> <p>This measure only applies to projects where restricted affordable housing units exist on the project site. Restricted affordable housing units are those whose affordability is legally designated and limited; for example, subsidized housing, tax credit housing, low-income housing, public housing, section 8 housing, or deed restricted housing.</p> <p>Affordable housing provides workers of various income levels and family members in various life stages options to remain in the community. When affordable housing units are lost, individuals and families lose the stabilizing foundation of home that is important to thrive. Further, displacement may lead to longer commutes and associated negative impacts such as pollution, less time for family and community, and reduced competitive disadvantage.</p> <p>This measure considers whether restricted affordable housing units will be replaced. If the project will result in the loss of restricted affordable housing units, 100 points are earned if there will be a binding agreement to provide one-for-one replacement of all currently affordable housing units, with first right of refusal granted to existing residents and in-perpetuity affordability covenants. The score is 75 if affordability restrictions are long term (e.g., 30+ years) rather than in perpetuity. The score is 25 if there will be one-for-one replacement of affordable housing units but without affordability restrictions. If no agreements will be in place to provide one-for-one replacement housing the score is 0.</p>	

<input type="radio"/> There will be a binding agreement to provide one-for-one replacement of all currently affordable housing units, with first right of refusal granted to existing residents and in-perpetuity affordability covenants.	
<input type="radio"/> There will be a binding agreement to provide one-for-one replacement of all currently affordable housing units, with first right of refusal granted to existing residents and long-term affordability covenants (e.g., 30+ years).	
<input type="radio"/> There will be a binding agreement to provide one-for-one replacement of all currently affordable housing units, with first right of refusal granted to existing residents but no long-term affordability restriction/covenant.	
<input type="radio"/> There will be no agreement to provide one-for-one replacement of all currently affordable housing units, with first right of refusal granted to existing residents.	
<p>8. Will the project include any housing units in addition to one-for-one replacement of affordable housing units? If yes, the following question is displayed. If no, NA to the following.</p> <p>① <i>How is this information used?</i> This question is for informational purposes and identifies whether the investment includes housing in addition to any one-for-one replacement of existing affordable housing units (i.e., this project includes housing and the existing site either includes no housing at all or only housing units that are not classified as restricted affordable housing). This measure has no score.</p>	Yes No
<p>8.a. Please select the statement that <i>best</i> describes the affordability of new housing units that are a part of your project (net of any one-for-one affordable housing replacement units). Select one of the responses below.</p> <p>① <i>How is this information used?</i> Housing costs are generally considered to be affordable when they do not exceed 30% of household income, though associated costs such as utility bills and transportation can significantly impact housing cost burden. An affordable housing supply is important for accommodating workers and families of various income levels and life stages. Housing affordability can impact recruitment and retention, as well as discretionary income to spend on local goods and services.</p> <p>This measure considers whether new housing will include units that are affordable to households at or below 120% of Area Median Income (AMI) spending a maximum of 30% on housing costs. The measure only applies to projects that include housing in excess of one-for-one replacement of restricted affordable housing units. A project that includes new housing units earns 100 points if there is a binding agreement ensuring that 10% or more of the housing units are affordable to households at or below 120% of Area Median Income (AMI) spending a maximum of 30% on housing costs, and that the affordability is assured in perpetuity through legal mechanisms such as recorded covenant or ground lease. The score is 75 if the affordability restrictions are long term (e.g., 30+ years) rather than in perpetuity. If less than 10% of the units are affordable to households with income at or below 120% of AMI then the measure score is 0.</p>	

<input type="radio"/>	10% or more of the units will be affordable (i.e., spending maximum 30% of income on housing costs) to households with income at or below 120% of Area Median Income (AMI) and affordability of these housing units in perpetuity is assured (e.g., through recorded covenant, ground lease or other legally effective mechanism).	
<input type="radio"/>	10% or more of the units are affordable (i.e., spending maximum 30% of income on housing costs) to households with income at or below 120% of Area Median Income (AMI) and long-term affordability (e.g., 30+ years) of these housing units is assured (e.g., through recorded covenant, ground lease or other legally effective mechanism).	
<input type="radio"/>	10% or more of the units are affordable (i.e., spending maximum 30% of income on housing costs) to households with income at or below 120% of Area Median Income (AMI), but without any long-term affordability restrictions.	
<input type="radio"/>	Less than 10% of the units are affordable (i.e., spending maximum 30% of income on housing costs) to households with income at or below 120% of Area Median Income (AMI).	

E. GOVERNANCE	Answer Options
<p>1. Does this project align with or support the region's economic development strategy?</p> <p>① <i>How is this information used?</i> Although globally connected, economies cohere at a regional scale where businesses access talent, amenities, and infrastructure that span political boundaries. Quality regional economic development strategies identify regional assets and prioritize investments that position the region for economic strength and resilience —the ability to generate and retain wealth in the community and successfully weather disruptions or changes to the economy. Aligning investment with high quality regional economic development strategies helps to ensure that scarce resources are used effectively and strategically.</p> <p>This measure assigns 100 points if the investment aligns with and supports the region’s economic development strategy. This may be a CEDS (Comprehensive Economic Development Strategy) or appropriate regional comprehensive plan with economic development element. No points are earned if the project does not align with the region’s economic development strategy or if alignment has not been verified. If there is not regional economic development strategy this measure is scored as “NA.”</p>	<p>Yes</p> <p>No</p> <p>If yes, please identify the ED plan and briefly describe alignment.</p>
<p>2. Please select the statement that best represents your engagement with diverse stakeholders. Select one of the responses below.</p> <p>① <i>How is this information used?</i> Appropriate stakeholder engagement can ensure that important information is taken into account in the project design and that the project is well-suited to the community. Appropriate stakeholder engagement may also broaden project support, which can be essential for project viability and important for maintaining community cohesion.</p> <p>This measure considers whether there is a commitment to 1) identify and work with diverse stakeholders that may affect or be affected by the project in order to 2) develop and implement an appropriate engagement strategy that includes tasks, timelines, and responsibilities. An appropriate engagement strategy will depend upon the context, and diverse stakeholders may include people of different age, ethnicity, or income as well as different agencies, jurisdictions, disciplines, and businesses.</p>	

<p>A score of 100 is earned if there will be a program or policy to identify and work with diverse stakeholders that may affect or be affected by the project in order to develop and implement an <i>appropriate</i> engagement strategy that includes tasks, timelines, and responsibilities. A score of 0 is earned if a program or policy will not be in place.</p>	
<p><input type="radio"/> There will be a program or policy to identify and work with diverse stakeholders that may affect or be affected by the project in order to develop and implement an <i>appropriate</i> engagement strategy that includes tasks, timelines, and responsibilities. Depending upon the context, diverse stakeholders may include people of different age, ethnicity, or income as well as different agencies, jurisdictions, disciplines, and businesses.</p>	<p>Please identify the lead stakeholder contact or contacts.</p>
<p><input type="radio"/> There will be no program or policy to identify and work with diverse stakeholders that may affect or be affected by the project in order to develop and implement an appropriate engagement strategy that includes tasks, timelines, and responsibilities. Depending upon the context, diverse stakeholders may include people of different age, ethnicity, or income as well as different agencies, jurisdictions, disciplines, and businesses.</p>	<p>Please identify the lead stakeholder contact or contacts.</p>
<p>3. Please select the statement that best describes capacity of key infrastructure to accommodate the proposed project. Key infrastructure includes sewer, water, transportation and utilities to service the project. Transportation capacity refers to the intended use (e.g., ten ton road to service the project) rather than overall indirect or induced trip generation. Select one of the responses below.</p> <p>① <i>How is this information used?</i> Sufficient capacity for key infrastructure such as water, sewer, transportation, and utilities must be in place to maintain competitiveness and quality of life. This measure considers whether the capacity of key infrastructure to serve the project has been confirmed and the levels are adequate.</p> <p>Sufficient capacity is defined as service levels for the intended use (e.g., ten ton road to service the project), rather than overall indirect or induced use. Indirect or induced demand should be addressed in the fiscal impact and stakeholder engagement measures in order to ensure that fiscal resources are not strained, levels of service do not decline, and quality of life is not diminished.</p> <p>This measure score is 100 if existing infrastructure capacity has been evaluated and is or will be sufficient to accommodate the proposed project without exceeding adopted or appropriate level of service standards. The measure score is 0 if capacity has not been confirmed or if capacity has been evaluated and is not sufficient to serve the project without exceeding adopted or appropriate level of service standards.</p> <p>The following template may be useful for securing agency input regarding key infrastructure capacity: The following serves to note that the [Jurisdiction, Agency] [e.g., City of Midvale Department of Engineering] has identified adequate sewer capacity to handle the [Name of Project] at the estimated capacity of [e.g., gallons per day]. This communication in no way serves as an endorsement or approval regarding the proposed project. Rather, it provides confirmation that infrastructure capacity has been considered and appears to sufficient to serve the proposed project.</p>	

<input type="radio"/> Existing infrastructure capacity has been evaluated and there is sufficient sewer, water, transportation, and utility capacity to accommodate the proposed project without exceeding adopted or appropriate level of service standards.	Please identify source of confirmation.
<input type="radio"/> Existing infrastructure capacity has been evaluated and is not sufficient to serve the project, however, the project includes infrastructure construction or upgrades that will result in sufficient capacity to accommodate the proposed project without exceeding adopted or appropriate level of service standards.	Please identify source of confirmation.
<input type="radio"/> Existing infrastructure capacity has been evaluated and there is not sufficient sewer, water, transportation, and/or utility capacity to accommodate the proposed project without exceeding adopted or appropriate level of service standards.	Please identify source of confirmation.
<input type="radio"/> The capacity of existing infrastructure to accommodate the proposed project has not been confirmed.	
<p>4. If a public investment is being made or requested for this project, please select the statement that best describes the fiscal impact review for this project.</p> <p>① <i>How is this information used?</i> Fiscal impact analysis considers budgetary impacts associated with an investment. For example, will the investment lead to increased costs of services and, if so, is there a corollary revenue stream to cover those costs? Effective fiscal impact analyses account for full costs and revenues and clearly identify assumptions regarding impacts, timeframes, and expenses.</p> <p>This measure applies if the project will be a recipient of public investment. A project earns 100 points if a fiscal impact analysis has been completed and demonstrates neutral or net positive impact. No points are earned if a fiscal impact analysis has not been conducted or if a neutral or net positive impact has not been identified. If the project is not a recipient of public investment, this measure does not apply and the project score is not affected.</p>	
<input type="radio"/> A fiscal impact assessment has been conducted and the net effect is positive.	Please identify source of fiscal impact analysis.
<input type="radio"/> A fiscal impact assessment has been conducted and the net effect is neutral.	Please identify source.
<input type="radio"/> A fiscal impact assessment has been conducted and the net effect is negative.	Please identify source.
<input type="radio"/> No fiscal impact analysis has been conducted.	
<input type="radio"/> Not applicable. No public investment is being made or requested for this project.	

<p>5. Please select the statement that <i>best</i> represents the incentive accountability plans for this project. Select one of the responses below.</p> <p>① <i>How is this information used?</i> Incentives are often provided in exchange for commitments to specific deliverables such as job creation. Linking incentives to performance is an important component of fiscal responsibility and accountability.</p> <p>This measure only applies when incentives or payments apply to the proposed investment. The score is 100 if legally binding provisions will be in place to verify performance and withhold, recapture, or recalibrate incentives if performance goals are not met. The score is 0 if no legally binding accountability provisions for incentives or payments will be in place.</p>	
<p><input type="radio"/> There will be a legally binding provision to withhold incentives or payments until performance goals are verified and/or to recapture incentives or payments if performance goals are not met.</p>	
<p><input type="radio"/> There will be no legally binding provisions to withhold incentives or payments until performance goals are verified and/or to recapture incentives or payments if performance goals are not met.</p>	
<p><input type="radio"/> No incentives or payments provided as part of this investment.</p>	
<p>6. Please select the statement that <i>best</i> describes transparency of funding. Select one of the following responses.</p> <p>① <i>How is this information used?</i> The use of public funds should be transparent with respect to key details such as funding amounts, recipients, agreements, conditions, risks, and performance. To be useful, this information needs to be easily accessible to the public (e.g., available on-line).</p> <p>This measure only applies if the project will be receiving public funds. The score earned for this measure is 100 if subsidy and performance information is or will be easily accessible to the public and 0 if subsidy and performance information is not or will not be easily accessible to the public.</p>	
<p><input type="radio"/> The project receives public funds and information regarding the amount of subsidy and any performance and accountability agreements is easily accessible to the public.</p>	
<p><input type="radio"/> The project receives public funds, however, information regarding the amount of subsidy and any performance and accountability agreements are not easily accessible to the public.</p>	
<p><input type="radio"/> No public funding provided.</p>	

<p>7. Please select the statement that <i>best</i> describes construction contractor standards. Select one of the following responses.</p> <p>① <i>How is this information used?</i> Responsible contractor programs establish basic requirements that a contractor must meet in order to be eligible to bid on a project. Responsible Contractor Standards (RCSs) may focus narrowly on past performance (e.g., prior violations of law, project completion) or inclusively to address criteria such as project wages and benefits for workers. Well-designed comprehensive responsible contractor standards are useful for ensuring that investment dollars are stewarded and maximum value achieved.</p> <p>The score for this measure is 100 if the project will have responsible contractor standards specifying the basic requirements that a contractor must meet in order to be eligible to bid on work associated with the investment. At a minimum the standards should address quality, history, and performance. Wages and benefits may be addressed in the quality construction jobs measure. The score for this measure is 0 if no responsible contractor standards will be defined. If the project does not include construction, this measure does not apply and the project score is not affected.</p>	
<p><input type="radio"/> The project will have responsible contractor standards to screen the basic requirements that a contractor must meet to be eligible to bid on work in the development project.</p>	
<p><input type="radio"/> The project will not have responsible contractor standards to screen the basic requirements that a contractor must meet in order to be eligible to bid on work in the development project.</p>	
<p><input type="radio"/> This project does not include construction.</p>	
<p>8. Is the applicant a certified B Corporation and/or does the applicant provide incentives that favor B certified companies as tenants or project beneficiaries?</p> <p>① <i>How is this information used?</i> Businesses that have received third party certification of their sustainability performance demonstrate strong alignment with TBL goals and deserve recognition for their commitments.</p> <p>B Corporations are businesses that have obtained third party certification regarding social and environmental performance by B Lab, a non-profit organization (http://www.bcorporation.net/). While a number of reporting systems exist to help businesses and their stakeholders assess sustainability issues, to date there is not an alternative third party certifier of triple bottom line businesses. This measure can be adjusted to accommodate additional certifications in the future if appropriate.</p> <p>If the applicant is a certified B Corporation and/or provides incentives that favor B certified companies as tenants or project beneficiaries 100 bonus points are earned. This measure is a bonus and does not impact the project score if there is no certification.</p>	<p>Yes</p> <p>No</p> <p>Don't Know</p>

<p>9. Does the project include relocation of existing jobs from another jurisdiction? If yes, the following question is displayed. If no, NA to the following.</p> <p>① <i>How is this information used?</i> Economic development that is based on recruitment and relocation of existing businesses may generate jobs in one community while leaving another worse off. In some cases, relocation may be occurring because a facility has exceeded its capacity, needs an upgrade, or requires a workforce with different skills. In these circumstances, efforts should be made to meet these needs without dislocating jobs in the current location if feasible and/or mitigate negative impacts on the existing community.</p> <p>This measure considers whether the jobs “created” by this project are the result of avoidable job loss in another jurisdiction. If the project does not involve relocation of an existing business from another location, this measure does not apply and the project score is unaffected. A neutral score (NA) is earned if the project involves the relocation of an existing business but the jurisdiction gaining the jobs cooperates with the jurisdiction losing the jobs to try and keep the company in the existing jurisdiction and/or to mitigate impacts on the existing jurisdiction. Documentation should address why the jobs need to be relocated, expected impacts on the communities losing the jobs, and efforts to avoid or mitigate impacts on the communities losing jobs. A score of 0 is earned if the project provides incentives or otherwise encourages the relocation of existing jobs from another jurisdiction.</p>	Yes No
<p>9a. Please select the statement that <i>best</i> describes relocation of jobs. Select one.</p>	
<p><input type="radio"/> The project provides incentives or otherwise encourages an existing business (jobs) to relocate from another jurisdiction.</p>	
<p><input type="radio"/> The project involves the relocation of an existing business from another location but the jurisdiction gaining the jobs cooperated with the jurisdiction losing the jobs to try and keep the company in the existing jurisdiction and/or to mitigate impacts on the existing jurisdiction.</p>	

V. DRAFT SUMMARY REPORT

The Tool generates a summary report of a project’s score for each of the three TBL goals (economic vitality, natural resource stewardship, and community vitality), with options to drill down and view the scores for each goal’s performance area, and each performance area’s measures. A sample project summary is below. Note in the sample screen shot below that the plus sign provides the opportunity to “drill down” and see sub-scores for each goal.


THE TRIPLE BOTTOM LINE TOOL

HOME
ABOUT THIS TOOL
CALCULATE YOUR TBL
CASE STUDIES
BETA FEEDBACK

Specify Location
Answer Questions:
Investment
Industry, Jobs & Wages
Construction & Operations
Placemaking
Governance
Generate TBL

TRIPLE BOTTOM LINE SCORE FOR: [PROJECT NAME] PRINT

Project Location



Legend	Definition
76-100	Project appears to be strongly aligned with TBL goals.
51-75	Project appears to be moderately aligned with TBL goals.
26-50	Project appears to be weakly aligned with TBL goals.
0-25	Project appears to be poorly aligned with TBL goals.

How Your Project Scored
 The following project summary provides scores for each of the three Triple Bottom Line goals, as well as performance areas and measures. The score for each TBL goal (economic vitality, natural resource stewardship, community well-being) is computed by taking the average of its performance area scores, and each performance area score is computed by taking the average of its measure scores. All scores are based on a scale of 0 – 100, indicating the degree of alignment or accomplishment. Detailed information about measures and scoring can be found in the TBL Tool User’s Guide.

The summary report presents project information along with project scores. The legend above is designed to help you interpret your scores. A “Due Diligence” report is also generated, providing a list of items that have been identified as completed, due to be completed, or warranting further attention.


As you review the project summary report, keep in mind that the results provide a general indication of a project’s strength. The TBL Tool is designed to account for contextual issues such as differences in project type, size, location, and community characteristics; however, the Tool draws upon national data sets that may not be appropriate or accurate in every instance. This version of the TBL Tool is most useful for identifying strengths and weaknesses of a project and exploring potential areas for improvement.

+ [PROJECT NAME]: TBL PROFILE

Economic Vitality 96
 Residents have access to good quality jobs, regional economic strength and resilience are fostered, and sound investment is encouraged. ⓘ

Natural Resources Stewardship 70
 Natural capital is used efficiently and ecosystem health is maintained or restored. ⓘ

Community Well Being 64
 Investments preserve or enhance unique culture, promote health and opportunity, and cultivate distinctive and well-functioning communities in which to work and live. ⓘ

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This project is supported with funding from the U.S. Economic Development Administration.


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VI. DATA REQUIREMENTS SUMMARY

The following provides a summary of the data required for the TBL Tool to calculate a project score, without the notation included in the “information bubbles.” Recall that, some of the items for which data is collected are included as bonus points or for information purposes only and are not included as part of the core TBL Project Score (i.e., not penalized if the item is not addressed by the project). In addition, items that are not relevant to a specific project are not included in the score (e.g., affordable housing is not part of score if the project does not have a housing component). The data requirements are grouped below into six sections as they are on the TBL Tool website.

A. INVESTMENT

1. Project costs

For **capital projects**, total project costs are the hard and soft costs directly contributing to completion of the capital project. If the project being proposed is an infrastructure investment directly serving an economic development project (e.g., a road to tech park, water treatment for a manufacturing facility) please use the total cost of the project that the infrastructure is designed to serve. For **non-capital** projects, total project costs are the hard and soft costs incurred for the specific project period.

Hard costs may include land or building acquisition, site preparation and mitigation, construction, equipment, infrastructure and utilities directly contributing to the project. Land cost is the purchase price or, if donated, the assessed value of land donated -- with zero as the minimum (i.e., no negative value if the site is a brownfield). **Soft costs** may include assessments and studies, professional services (e.g., architectural, engineering, legal), inspections, permits, insurance, financing, and operating costs for non-capital project.

- a. Total project costs
- b. Amount of total project costs, if any, paid for with private investment
- c. Amount of total project costs, if any, paid for with public investment
- d. Funding request, if any (e.g., this is a grant or loan application).

2. Has a Pro Forma been conducted that demonstrates financial viability of the project?

3. Does the investment include a program or policy to prioritize or encourage the purchase of goods and services from businesses that are owned and operated in the metropolitan area, micropolitan area, or county in which the project is located (i.e., supports retention of dollars in the local economy)? Bonus question.

B. INDUSTRY, JOBS, AND WAGES

1. Direct Jobs – Wages and Benefits

- a. Industry NAICS code(s) for the project's direct jobs created and/or retained.

This will be a pull down menu and mostly at the 3 digit level (two for retail and four or five for some manufacturing). If the project includes more than 5 industries, select the top 5 by number of direct permanent jobs created and/or retained. Information regarding construction jobs is provided in another section. If this is an infrastructure investment directly serving an economic development project (e.g., road to tech park, water treatment for manufacturing facility) enter the industry(ies) and jobs for the project that the infrastructure is designed to serve. Note: One question of pilot test survey is whether 5 industry choices is a sufficient number.

- b. Number of direct permanent jobs created and/or retained when the project is completed for each of the industries identified above (entered as FTE – full time equivalents). FYI only.
 - c. Expected average wage for the jobs created and/or retained by this project, if known.
 - d. Percent of the direct jobs created and/or retained that will provide good quality employee benefits (e.g., affordable health insurance, sick days, vacation days, and retirement benefits).
 - e. Percent of direct permanent jobs that are existing jobs being retained or relocated. FYI only.
 - f. Will the project have tenants?
If yes, will incentives be provided to tenants that offer employee benefits (e.g., health insurance, sick days, vacation days, retirement benefits)? Bonus question.
 - g. Percent of total direct (non-construction) jobs created and/or retained that pertain to one or more of the following green products or services: create energy from renewable sources; improve energy efficiency; reduce or remove pollution, waste, or greenhouse gases; natural resource conservation (including sustainable agriculture and forestry); increase environmental compliance, education and training. If none, enter "0." Bonus question.
- h. Will the number of jobs created or retained distinguish this project as a major employer in the area or have a particularly catalytic impact on employment in the area? An example of a catalytic project is an arts center that does not create a lot of direct jobs but is a destination of renown that greatly supports the creation of jobs in tourism and arts related businesses. Another example might be a small technical center that provides critical assistance to farmers throughout the region? Bonus question.

2. Direct Jobs – Career Access and Advancement Opportunities

- a. Will there be a binding agreement to collaborate with relevant workforce development and/or community-based organizations to define hiring targets appropriate to the area's population and monitor performance (i.e., tracking baseline information, effort, requests and considerations, and results)?
- b. Will there be a binding agreement to partner with relevant community-based and/or public organizations to conduct recruitment, training, and placement appropriate to the defined target populations (e.g., cultural competency, success training and placing traditionally disadvantaged or underutilized populations)?

- c. Will there be a binding agreement to provide professional development and training on the job and/or through payment or reimbursement for continuing education (e.g., workshops, seminars, courses)?
- d. Will there be a binding agreement in place to utilize, mentor, or partner with underutilized business(es)?

If construction trade workers will be employed as part of this project, please provide the following information.

3. Construction Jobs – Wages and Benefits

- b. Total construction hours. FYI only.
- c. Will the project include a legally binding agreement to properly classify construction employees and make certified payroll records available to a public entity or advisory body?
- d. Is there a legally binding agreement to pay state defined prevailing wage rates for the trade or, where appropriate, "like pay" for the trade in the benefit area? Like pay refers to the average pay for the trade in the project area and may be an appropriate substitute for prevailing wage if the survey area establishing prevailing wage does not adequately reflect the project context (e.g., a rural project with wages set at a metro level).
- e. Will the project include a legally binding agreement to provide health insurance benefit options to construction employees?
- f. Will the project include a legally binding agreement to provide retirement benefits to construction employees?
- g. Will the project include a legally binding agreement to provide minimum 10 hour OSHA safety training for all workers and 30 hour training for all supervisors?
- h. Will a Project Labor Agreement applicable to union and non-union workers be in place? Bonus question when total project costs are less than \$10 million.

4. Construction Jobs – Career Access and Advancement Opportunities

- a. Is the contractor a registered apprentice or training program participant?
- b. Will the contractor have an agreement in place to meet or exceed the minimum recommended **apprentice utilization levels** within legal maximums (percent of total hours or workforce as recommended by federal or state law)? If so, is the agreement binding or non-binding?
- c. Where will be an agreement in place that a minimum of percent of **non-apprentice construction employment hours** will be performed by traditionally disadvantaged and underutilized populations as defined by appropriate community-based and public organizations (e.g., targeting low income, women, people of color, veterans, disabled individuals, or formerly incarcerated individuals)? If so, please note whether the agreement is binding or non-binding and whether the amount is for a minimum of 20% or 30%.
- d. Where will be an agreement in place that a minimum percent of **apprentice hours** will be performed by traditionally disadvantaged populations as defined by appropriate community-based and public organizations when they are part of the available pool of apprentices (e.g., targeting low income, women, people of color, veterans, disabled individuals, or formerly incarcerated individuals).

30%? Bonus Point. If so, please note whether the agreement is binding or non-binding and whether the amount is for a minimum of 20% or 30%.

- e. Will there be a program in place to utilize, mentor, partner or otherwise support participation of **under-represented businesses** in project construction contracts? If so, will the program be binding or non-binding?

C. CONSTRUCTION AND OPERATIONS

- 9. Project address.
- 10. Will the project receive third party certification by an appropriately recognized international, national, or regional program for green building and/or infrastructure (e.g., LEED, Earth Advantage, Green Globes, GreenLITES) or demonstrate plans to build to third party standards but without certification?
- 11. Does the project make use of an existing structure (e.g., reuse/remodel rather than new construction)? Bonus question.
- 12. Will the project receive third party certification by an appropriately recognized international, national, or regional sustainable site design or low impact development program (e.g., Sustainable Sites, LEED-ND, One Planet Communities) or demonstrate plans to build to third party standards but without certification?
- 13. Does the project remediate a brownfield site and/or provide habitat restoration? If yes, how many acres will be remediated/restored as part of this project? Please round to the nearest quarter of an acre. Bonus question.
- 14. Is the investment designed to improve walkability and/or transit accessibility (e.g., a mixed use development that contributes to community completeness, provision of retail services within ¼ mile of housing, addition of transit to area)? Bonus question.
- 15. Will demand management or trip reduction strategies be put in place to reduce automobile trips associated with employee and/or customer commuting (e.g., telecommuting, transit passes, shuttles, bicycle facilities and locker rooms)?
- 16. Will on-going facility performance be monitored through participation in the Energy Star Energy Management program?
- 17. Will a portion of the project's energy supply come from renewable resources including solar, wind, geothermal, biogas, biomass, and low impact hydroelectric sources either through utility purchase, renewable energy certificates [RECs], or on-site generation sources (3% to 20% depending upon annual usage)?

If yes:

- a. What percent?
- b. Will the project owner participate in the US Green Power Partnership Program?
- c. If the project has tenants, will tenants be required or incentivized to participate in the US Green Power Partnership Program?

18. Will the project include strategies to achieve lower water use than is the norm for the project industry or industries (e.g., a chip manufacturer incorporates a water recycling process that results in less water use than the industry norm)? Building features such as low-flow toilets are not addressed here; they are addressed in the green building measure above. Bonus question.
19. Will the project include strategies to produce less toxic emissions to air, water, or land than is the norm for the project industry or industries (e.g., use of a non-toxic alternative to industry standard)? Bonus question.
20. Will the project be compliant with certifications or standards for industry best environmental practices (e.g., green tourism, information technology, forestry, agriculture/food production)? Bonus question.
21. If the project has tenants, will the building owner require, incentivize, or encourage the tenants/occupants to meet best practices in green operations and management?

D. PLACEMAKING AND ACCESSIBILITY

6. Will the project preserve, enhance, or diminish culturally or historically significant structures, facilities, or districts?
 - a. If preserving or enhancing, does the project meet criteria for inclusion on national, state, or local registry and/or have a letter supporting cultural or historical significance provided by appropriate historical or cultural commission or agency?
7. Will the project have a positive, negative, or neutral impact on culturally or historically significant practices?
8. Will the project include culturally or historically significant programming (e.g., performances, activities)? If so, are any components designed explicitly to serve the community (e.g., connection to schools, discount days)?
9. Does the project create, enhance, or diminish public spaces (e.g., public spaces include parks, plazas, trails, gardens, and scenic views)? Public spaces may be privately owned but publicly accessible and may be vertical spaces (e.g., rooftop garden)?
 - a. If preserving or enhancing, will there be a plan in place to promote productive public use and care of the space (e.g., interpretive signs, marketing campaign, stewardship partnership with neighbors or schools, integration into the surrounding area, uses and activities are designed to create vibrancy and use across day and seasons)?

10. Will any residents and/or businesses be temporarily or permanently relocated as a part of this project? If yes,
 - a. Will a relocation plan for residents and business that is appropriate to their needs before, during, and after relocation be developed and will the plan include details regarding counseling and support services, opportunities to return, financial assistance for costs associated with relocation, and clear specification of tasks, timelines, responsibilities, performance monitoring, and recourse/consequence?
 - b. Is there a plan to meaningfully collaborate with diverse residents and businesses in the area in creating the relocation plan, with a particular focus on underrepresented and disadvantaged populations?

11. Is the cost of living or doing business in the neighborhood likely to increase as a result of this project (i.e., residents and/or businesses may be priced out of the neighborhood or involuntarily displaced)? If yes,
 - a. Will an anti-displacement strategy be created to prevent and mitigate potential displacement of residents and businesses in the surrounding area due to factors such as rising rents and taxes?
 - b. Is there a plan to meaningfully collaborate with diverse residents and businesses in the area in creating the anti-displacement strategy, with a particular focus on underrepresented and disadvantaged populations?

12. Are there restricted affordable housing units on the project site? (i.e., affordability limited under a government contract, deed restriction, or other measure; for example, subsidized housing, tax credit housing, low income housing, public housing, section 8 housing, deed restricted housing) If yes,
 - a. Will binding agreements be in place to provide one-for-one replacement of currently affordable housing units at the project site and what is the duration of the agreement (e.g., 10 years, 30 years, perpetuity)?

13. Will the project include any housing units in addition to one-for-one affordable housing replacement units? If yes,
 - a. What percent of the units are designated as affordable (.e., spending maximum 30% of income on housing costs) to households with income at or below 120% of Area Median Income (AMI)?
 - b. Will long term affordability of these housing units be assured and, if so, for how long?

E. GOVERNANCE

1. Does this project align with or support the region's economic development strategy?

2. Is there or will there be a program or policy to identify and work with diverse stakeholders that may affect or be affected by the project in order to develop and implement an appropriate engagement strategy that includes tasks, timelines, and responsibilities? Depending upon the context, diverse stakeholders may include people of different age, ethnicity, or income as well as different agencies, jurisdictions, disciplines, and businesses.

3. Has existing infrastructure capacity confirmation been evaluated?
If so, is there or will there be sufficient sewer, water, transportation, and utility capacity to accommodate the proposed project without exceeding adopted or appropriate level of service standards? Key infrastructure includes sewer, water, transportation, and/or utility capacity to accommodate the proposed project. Transportation capacity refers to the intended use (e.g., ten ton road to service the project) rather than overall indirect or induced trip generation.
4. If a public investment is being made or requested for this project, has a fiscal impact been conducted?
If so, was the identified net benefit positive, neutral, or negative?
5. Will incentives be provided for this project and, if so, are there any legally binding provisions to withhold incentives or payments until performance goals are verified and/or to recapture incentives or payments if performance goals are not met?
6. Does the project receive public funding and, if so, is information regarding the amount of subsidy and any performance and accountability agreements easily accessible to the public?
7. If the project includes construction, are responsible contractor standards in place for screening of the basic requirements that a contractor must meet in order to be eligible to bid on work in the development project?
8. Is the applicant a certified B Corporation and/or does the applicant provide incentives that favor B certified companies as tenants or project beneficiaries? Bonus question.
9. Does the project include relocation of existing jobs from another jurisdiction and, if so, does the project include incentives or otherwise encourage an existing business (jobs) to relocate from another jurisdiction? Have efforts been made to retain the jobs in the existing jurisdiction and/or mitigate the impacts on the community?