

# Headwaters Community Investment Fund List of Criteria and Scoring Worksheet

**Project Name:**

**Funding Requested:**

**Board Member Name:**

**Date Reviewed:**

Does the project fulfill an unmet need? Yes\_\_\_\_\_ No\_\_\_\_\_

Does this project have alternative sources of funding? Yes\_\_\_\_\_ No\_\_\_\_\_

If so, is there a reason why Headwaters Funding would be appropriate anyway? Yes\_\_\_\_\_ No\_\_\_\_\_

Does the organization appear to have the capacity and experience to implement the program? Yes\_\_\_\_\_ No\_\_\_\_\_

**Economic Impact - 50 Points Available (check off boxes which apply, a project may receive full points in any one outcome, or for providing benefits across several)**

<input type="checkbox"/>	Benefits the base or Targets of Opportunity industries
<input type="checkbox"/>	Develops strategies for economic development or supports existing strategies
<input type="checkbox"/>	Provides access to external markets or plugs the leaks
<input type="checkbox"/>	Retains and grows existing businesses
<input type="checkbox"/>	Creates economic development infrastructure
<input type="checkbox"/>	Leverages future funding or projects
<input type="checkbox"/>	<b>Total Points - Economic Impact</b>

**Impact on Environment and Quality of Life - 30 Points Available (check off all boxes which apply)**

<input type="checkbox"/>	Protects and/or improves the natural environment
<input type="checkbox"/>	Supports sustainable use of environmental resources
<input type="checkbox"/>	Revitalizes communities/infrastructure
<input type="checkbox"/>	Builds public infrastructure
<input type="checkbox"/>	Improves public or pedestrian transportation
<input type="checkbox"/>	Utilizes existing buildings
<input type="checkbox"/>	Fits with community image and identity
<input type="checkbox"/>	Preserves heritage
<input type="checkbox"/>	Contributes to Humboldt County being a desirable place to live
<input type="checkbox"/>	<b>Total Points - Environment and Quality of Life</b>

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## Project Design and Readiness and Fiscal - 20 Points Available (check off boxes which apply)

<input type="checkbox"/>	Demonstrates cross-sector support (i.e. government/private or cross industry)
<input type="checkbox"/>	Ingredients for project success in place- research, planning, permitting
<input type="checkbox"/>	Project scope contains sufficient detail to define success
<input type="checkbox"/>	Visible private industry sector support (i.e. letter of support)
<input type="checkbox"/>	Project is in a geographically underserved area or serves an underserved population
<input type="checkbox"/>	Implementation vs preliminary phase (Implementation projects receive higher points than preliminary studies)
<input type="checkbox"/>	Timeliness of project and likelihood it will succeed
<input type="checkbox"/>	Diversity of funding partners and firmness of commitments
<input type="checkbox"/>	Project budget well thought out and reasonable
<input type="checkbox"/>	Degree of match funding (both committed and not, with higher points for committed)
<input type="checkbox"/>	<b>Total Points - Design and Readiness and Fiscal</b>

**Grand Total for the Project**

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## Explanation of Rating Criteria

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### **Economic Impact**

A project can receive full points based on any one of the following outcomes, or could receive full points by providing benefit across several outcomes. Projects should only receive full points if they demonstrate support for the County's economic development strategy Prosperity! which focuses on developing the Targets of Opportunity or base industry clusters. Projects can support these clusters using any of the strategies listed below with an end goal of creating new at or above median wage jobs.

Points should be assigned based on the stated direct effect the project has on increasing the capacity of the base or Target industries. A project which provides direct support to a group of businesses in an industry which will allow them to increase sales outside of the county and then create jobs could receive full points. A project with a less clear outcome related to industry benefits should receive less points.

The final goal of any of the economic development strategies listed below is to create new jobs which are at or above the median wage level. A project should receive more points if it is able to directly correlate its implementation with a substantial number of new sustainable jobs. The base or Target industries are: Lumber and Wood Products, Fishing, Niche Manufacturing, Specialty Agriculture, Arts and Culture, Tourism, Information Technology, Education and Research, Dairy, and Diversified Health Care.

#### **Develops Strategies for Economic Development or Supports Existing Strategies**

In this outcome points are assigned for projects involving developing economic development strategies.

Projects should be tied to leveraging funds for implementation. Higher points should be assigned for projects which can show a direct link from the planning phase to the implementation phase and have a feasible plan for securing implementation funding. Projects in support of planning for Target or Base Industries should receive more points.

#### **Providing Access to External Markets or Plugging the Leaks**

Projects can receive full points in this outcome if they demonstrate that they will help businesses with exporting sales out of the county. Projects can also receive full points if they can show that they will have an impact on redirecting consumer purchases from non local companies to local ones. Projects which can predict a concrete and substantial increase in sales for a group of businesses or industry should receive more points. An example of a CIF project which helped plug a leak is the grant to St. Joseph's Hospital to purchase telemedicine equipment in order to provide additional medical services locally.

#### **Retaining and Growing Existing Businesses**

A project could be assigned full points in this outcome if the applicant project will lead to the retention or growth of existing businesses.

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## **Economic Development Infrastructure**

Projects which rate highly in this outcome provide for infrastructure which is directly related to business and job growth. An example of a project in this area was the grant for the flake ice plant for the fishing industry on the waterfront in Eureka.

## **Leverages future funding or projects**

Projects which directly leverage funding from sources outside of the County can receive full points. An example of a project which rated strongly in this area was a \$515,000 loan to the airport which provided the necessary matching funds to access \$8.7 million in federal grant funds for runway improvements.

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## **Impact on Environment and Quality of Life**

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### **Protects and/or improves the natural environment**

A project can receive points for demonstrating that it is contributing to the protection or improvement of the natural environment.

### **Supports sustainable use of environmental resources**

A project receives points for demonstrating that it provides support for the sustainable use of environmental resources. An example of this would be the grant to the Yager Van Duzen Stewards to document their voluntary sediment reduction plan developed with local ranchers.

### **Revitalizes communities/infrastructure**

This applies to projects which seek to revitalize communities with a goal of economic development. An example of this would be the grant to the Mid Klamath Watershed Council to purchase the Panamnik Building to convert it to a community and economic development center.

### **Builds public infrastructure**

Points should be given for projects which allow for the building or renovation of basic public infrastructure - water, sewer, power etc. which leads to the development of healthy communities.

### **Improves public or pedestrian transportation**

This category applies to project which provide for the planning or implementation of public transportation with an emphasis on pedestrian walkways.

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## **Utilizes existing buildings**

Projects receive points for new and innovative uses for under utilized buildings. An example of a grant in this category is the Mid Klamath Watershed Council grant to purchase the Panamnik Building in Orleans and convert it into a community and economic development hub.

## **Fits with community image and identity**

Projects should be able to show that they are in alignment with the community identity either of Humboldt County as a whole or with the constituents they are working with

## **Preserves heritage**

Projects receive points for demonstrating that they are contributing to preserving the cultural heritage of our County.

## **Contributes to Humboldt County being a desirable place to live**

Projects in this category contribute to the general desirability of Humboldt County as a place to live in ways not listed above. This could be in terms of cultural, recreational or social opportunities.

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## **Project Design and Readiness and Fiscal**

**A project which receives full points should have most of these boxes checked off.**

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### **Demonstrates cross-sector support (i.e. government/private or cross industry)**

This box could be checked off if there is demonstrated support across sectors. This would be demonstrated by collaborative partners or letters of support.

### **Ingredients for project success in place- research, planning, permitting**

Applicant should show that adequate planning has taken place in advance of submitting the application.

### **Project scope contains sufficient detail to define success**

Project should include measurable outcomes as part of its definition of success and demonstrate capacity on the part of the applicant to collect information and report on those outcomes.

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## **Visible private industry sector support (i.e. letter of support)**

Project must demonstrate the support of local private businesses.

## **Project is in a geographically underserved area or serves an underserved population**

Projects receive more points for representing an underserved population or geographic area. Projects also receive more points for representing a population or geographic area which has not received Headwaters funding in the past.

## **Implementation vs preliminary phase (Implementation projects receive higher points than preliminary studies)**

Projects which are applying for implementation funding should receive more points than projects in the planning phase.

## **Timeliness of project and likelihood it will succeed**

Project must demonstrate that the timing is right, and the necessary ingredients for success are in place.

## **Diversity of funding partners and firmness of commitments**

Project should demonstrate a wide range of committed funding.

## **Project budget well thought out and reasonable**

Project budget should demonstrate strategic planning and be realistic in terms of project cost and expected revenue.

## **Degree of match funding (both committed and not, with higher points for committed)**

More points are given for projects which have their funding in place over projects still seeking match.