

MEMORANDUM

DATE: October 18, 2024

TO: Governing Board
San Francisco Bay Restoration Authority

FROM: Sara Haugen, Grant Program Coordinator
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San Francisco Bay Restoration Authority

SUBJECT: Yearly Update on Implementing the Equity Guidelines

Staff is providing this yearly update as part of ongoing efforts outlined in the Equity Guidelines, which were adopted on May 3, 2024 through [Resolution 122](#). The Guidelines evolved from [Resolution 70](#), which adopted recommendations for implementing Measure AA to benefit economically disadvantaged communities and directs staff to report back annually on the Authority's progress in implementing the recommendations. The majority of these recommendations were intended to be accomplished within two years. Recognizing the need for Equity Guidelines that would extend through the remainder of the Measure AA parcel tax period, staff collaborated with the Advisory Committee (AC) and community-based organizations to develop them, and those efforts are summarized in this memo, as well.

Background

Measure AA states, “[t]he Authority shall give priority to projects that... [b]enefit economically disadvantaged communities,” or EDCs. The Governing Board and the AC have both expressed a strong commitment to achieving this goal.

The AC's development of equity recommendations is described in the staff memo, [Improving Equity and Community Engagement in the Measure AA Grant Program](#), presented at the Governing Board meeting of December 6, 2019. The full AC approved the recommendations and presented them to the Governing Board, which passed Resolution 70, described above. The present memo details work completed in Fiscal Year (FY) 2023-2024 in the structure of the Equity Guidelines (Attachment 1).

Authority's Progress in Fiscal Year 2023-2024

In FY 2023-2024, the Authority implemented the Equity Guidelines (Attachment 1) in four main ways: 1) completing the first Community Grants Cohort and improving the Community Grants Program; 2) finalizing the Equity Guidelines; 3) finalizing Tribal Engagement Recommendations; and 4) updating the grant program materials. Authority staff are also involving AC members in evaluating progress and effectiveness of equity actions and accomplishments for FY 2023-2024 by asking AC members to review this yearly update. The following narrative is supplemented by a detailed table below.

- 1) **Community Grants Program and Cohort.** The Authority completed the third year of the Community Grants Program, which specifically funds community-based organizations (CBOs) in economically disadvantaged communities (EDCs) on a rolling

basis. To date, the Authority has funded five community grants, totaling approximately \$1,099,713. More details on proposed and funded Community Grants can be found in Attachment 2.

- **FY 23-24 Budget and Projects Authorized to Date:** Building on the previous three years of funded projects, the Authority allotted \$600,000 for the Community Grants Program for Fiscal Year 2023-2024 and increased the maximum grant awards to \$300,000 each in Spring of 2024. Staff received two eligible grant proposals in FY2023-2024, and the Authority funded both: (1) Sacred Spaces Planning Project by Ninth Root (Coastal Quest fiscal sponsor); and (2) Storytelling Shoreline Futures: Youth Visioning and Action by Mycelium Youth Network.
- **Achievements and Challenges to Date:** The challenges of this program chiefly relate to grantees' familiarity with the types of documents needed before starting project work, such as evidence of insurance and landowner agreements; and capacity to both carry out their project work and provide required invoicing documentation as part of grant management. Staff provide flexibility and technical assistance to grantees facing these challenges.
- **Community Grants Cohort:** Staff initiated the Community Grants Cohort in the spring of 2023 to more directly engage with potential and current grantees from CBOs by providing technical assistance and opportunities for information sharing among the groups. In Fiscal Year 2023-2024, staff continued to support participants in the Community Grants Cohort by providing training on grant management and organizing a project tour with grantee speakers and other habitat restoration professionals. The cohort closed in the fall of 2023, and participants expressed interest in being invited to any future cohorts, depending on interest from new grantees.
- **Lessons Learned and Next Steps:** In the coming years, staff will continue to facilitate capacity building in the organizations that receive Community Grants Program funding by providing staff technical assistance and inviting AC members to provide relevant guidance to applicants and grantees. Grantees with proactive fiscal sponsors often benefit from their bookkeeping services, documentation of grant expenses, and other expertise needed to manage an Authority grant successfully.

2) Finalizing Equity Guidelines. As presented to the Board in the last update, staff worked with the AC Ad Hoc Subcommittee for Equity to create Equity Guidelines from which staff can create 5-year work plans for the remainder of Measure AA. Input from the Subcommittee led staff to change the method of gathering feedback from EDCs. Instead of asking representatives of CBOs to comment on a guidelines document, staff requested their input in-person at Community Outreach Sessions. From these sessions, staff shared the [Summary of Feedback from 2023 Community Outreach and Listening Sessions](#), [Equity Guidelines in Action](#), and a [redline version of the proposed Equity Guidelines](#) with the participants then with the Board at their December 15, 2023 meeting. After rounds of feedback from the Board and AC, the Board adopted the Equity Guidelines at their May 3, 2024 meeting through Resolution 122.

3) Finalizing Tribal Engagement Recommendations. This document is a continuation of staff efforts from the [Tribal Engagement Policy Development Memo](#) presented to the Governing

Board in June of 2022. As a first step, Authority staff reviewed recommendations for improving tribal engagement that were gathered through surveys and reports conducted by other natural resource agencies. Staff contacted these agencies for the non-confidential feedback they had gathered from tribes with respect to engagement. Some examples of the documents staff reviewed include, but are not limited to, the San Francisco Estuary Partnership Regional Water Needs Assessment, Ocean Protection Council Tribal Engagement Strategy, and State Coastal Conservancy Strategic Plan 2023-2027. Staff took this initial step to minimize the burden of requests to tribes to educate natural resource agencies. Staff then conducted outreach to San Francisco Bay Area tribes and tribal organizations, ultimately working directly with five tribal representatives to refine the recommendations with their feedback. After providing opportunities for additional feedback to the redline version of the draft Tribal Engagement Recommendations from tribal representatives, AC, and Board, the Board adopted the Tribal Engagement Recommendations at their May 3, 2024 meeting through [Resolution 123](#).

4) Updating Grant Materials and Processes. In July of 2020, the Authority released a thoroughly revised RFP and Grant Application, and a new Pre-Application, for the fourth round of Measure AA's grant program. For 2024, the eighth round of grant materials followed a similar template, with a few significant updates. The changes to the grant program materials included:

- **RFP, Section III. Solicitation Priorities:**
 - Revision to Footnote 5 to reference Appendix B, containing citations of relevant plans.
 - Addition of Footnote 6 regarding the need to ensure that public access elements of projects consider accessibility for people with disabilities.
 - Addition to Footnote 8 (formerly Footnote 7) regarding Economically Disadvantaged Communities, referencing the recently adopted Equity Guidelines.
 - Reference to the recently adopted Tribal Engagement Recommendations as part of existing solicitation priority.
- **RFP, Appendix B:**
 - Updates to Full Citations for Local and Regional Plans Most Relevant to the Grant Program.
- **Grant Application, Section I.6. Community Support, Involvement and Benefits:**
 - Revision of Footnote 1 to direct applicants to the recently adopted Tribal Engagement Recommendations and Equity Guidelines for additional guidance on increasing project involvement of and benefits for California Native American tribes, people of color, and people with disabilities.

Details on Implementation of the Equity Guidelines

As described above, the Authority has implemented the Equity Guidelines during FY 2023-2024 in four main ways: 1) staffing the Community Grants Program and Cohort; 2) finalizing the Equity Guidelines; 3) finalizing the Tribal Engagement Recommendations; and 4) updating the grant program materials and processes. In addition to these efforts, staff have started implementing actions under the six categories of the Equity Guidelines. A description of how the

actions listed in the Guidelines have been addressed during the last fiscal year is provided in the table below. The full Equity Guidelines can be found in Attachment 1.

1. Representation

Guideline	Progress in FY 2023-2024
Strive for representation on staff, Advisory Committee, Oversight Committee, and Governing Board that reflects the diversity of the Bay Area and cultivate an inclusive culture.	<i>See Next Steps and Preview of FY 2024-2025 Equity Work.</i>
Hire interns from economically disadvantaged communities (EDCs), tribes, and people with disabilities to work for the Authority.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>
Support environmental workforce development and career guidance to support increased diversity in the conservation field.	Prioritized projects that include environmental workforce development to support increased diversity in the conservation field. Example: Sacred Spaces Planning project is a community planning grant that will support this guideline when it moves into implementation.

2. Outreach and Partnerships

Guideline	Progress in FY 2023-2024
Build relationships with community-based organizations in EDCs and tribes.	<ul style="list-style-type: none"> ○ Hosted three community outreach listening sessions to gain feedback from community-based organization (CBO) partners on how to make grant programs more accessible. The feedback also helped to inform the Equity Guidelines. ○ Organized a series of meetings for a Community Grants Cohort to provide grant management training to Community Grant recipients and applicants, and to provide opportunities for them to connect with each other and staff on a project tour.
Conduct more and better outreach to known community groups and expand outreach beyond known groups to others who may be	<ul style="list-style-type: none"> ○ Conducted joint outreach with the Wetlands Regional Monitoring Program during the outreach process

interested. This includes conducting joint outreach where appropriate with partners.	for developing the Tribal Engagement Recommendations.
Work with workforce development organizations to identify opportunities for Authority projects to provide a pipeline to jobs in the environmental and conservation fields.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>

3. Applications and Grants

Guideline	Progress in FY 2023-2024
Expand both the number of applications and awards in the Community Grant Program.	<ul style="list-style-type: none"> ○ Awarded two new Community Grants: (1) Sacred Spaces Planning Project; and (2) Storytelling Shoreline Futures: Youth Visioning and Action.
Support Community Grant Program grantees in building capacity to apply to the Authority’s competitive grant rounds, including providing feedback before and after grant rounds.	<ul style="list-style-type: none"> ○ Provided staff guidance and support for CBO grantees to develop skills and capacities necessary to successfully manage government grant funding.
Provide more funding to community-based organizations and tribes through grants to established restoration partners.	<ul style="list-style-type: none"> ○ RFP materials encourage applicants to work with community-based organizations and tribes to be competitive in the grant round.
Improve application and grant processes to reduce barriers to participation and highlight equity and community engagement in grant program materials.	<ul style="list-style-type: none"> ○ Added summary slides along with RFP materials to provide a plain-language overview of the grant program requirements.
Remain flexible throughout the grant process to support the needs of grantees and communities.	<ul style="list-style-type: none"> ○ Practiced flexibility throughout the grant process to support the needs of grantees and communities. For example, staff worked with Ninth Root to further define their proposed project’s scope in the process of applying for their Community Grant.
Improve the Authority website to ensure accessibility.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>
Regularly review and revise application scoring criteria to ensure consistency with these Equity Guidelines.	<ul style="list-style-type: none"> ○ As detailed above, staff updated RFP materials for the eighth grant round.

Expand and improve technical assistance provided to applicants in areas such as defining project scope, meeting grant requirements, and preparing invoicing documentation.	<ul style="list-style-type: none"> ○ Provided feedback on why denied proposals are not a fit and helped connect applicants with resources. ○ Supported grantees with fulfilling pre-disbursement grant requirements.
Connect applicants and grantees with private foundations and external funding sources to address funding gaps.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>
Provide networking opportunities for community-based organizations with landowners, restoration practitioners, and other potential partners.	<ul style="list-style-type: none"> ○ Encouraged networking among community groups, habitat restoration professionals, and the Authority through Board tours that were open to the public. ○ Incentivized partnerships by matching up applications with complementary projects, as applicable.

4. Meaningful Engagement

Guideline	Progress in FY 2023-2024
Meet communities where they are, physically and in terms of their priorities.	<ul style="list-style-type: none"> ○ The Authority has visited these communities through Board tours and Community Grant Cohort site visits. Staff are working on striking a balance between meeting communities and considering the capacity burden these visits place on partners. ○ Worked to rebuild trust with communities by engaging mindfully and following up on discussions and developing policies.
Increase Authority staff interactions with community-based organizations to learn more about their interests, needs, and community engagement methods.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>
Encourage grant applicants to include community engagement in the scope of work for their project, and to include funding for community engagement tasks, such as food and childcare, in grant budgets.	<ul style="list-style-type: none"> ○ Linked the Coastal Conservancy’s “Tips for Community Engagement” and the Wetland Regional Monitoring Program’s (WRMP’s) “Best Practices for Tribal Engagement” to the

	Authority’s application materials and website.
Support inclusion of California Native American voices, leadership, and perspectives, including traditional ecological knowledge and tribal stewardship.	<ul style="list-style-type: none"> ○ This was emphasized in the Tribal Engagement Recommendations document, and progress will be tracked in a distinct section of the five-year equity work plan.
Track changes made to project design and implementation as a result of community and tribal engagement.	<i>Plan for implementation in forthcoming five-year equity work plan.</i>

5. Project Benefits

Guideline	Progress in FY 2023-2024
<p>Prioritize projects that:</p> <ul style="list-style-type: none"> a. Achieve more restoration in areas accessible to EDCs. b. Provide more public access amenities (trails, picnic areas, bathrooms, culturally relevant interpretative areas, and signs) in or near EDCs. c. Provide flood protection to EDCs. d. Provide jobs and job training to EDC residents, tribes, and people with disabilities. e. Ensure that public access elements of projects consider accessibility for people with disabilities. f. Enable tribes to conduct traditional stewardship and cultural practices on ancestral land and co-manage these lands and natural resources. g. Ensure tribal concerns are respected and archaeological and cultural resources are protected. h. Assist tribes to regain access to their ancestral lands along the Bay shoreline through the Authority’s grant programs. 	<ul style="list-style-type: none"> ○ Allowed grant funds to pay residents with stipends to attend workdays and community engagement sessions. ○ Authorized 41 projects, 59% of which benefited EDCs (as of June 2024). Project benefits include expanding shoreline access and amenities, providing flood protection, fostering leadership development, and remediating a contaminated site. ○ Funded 2 new Community Grants (as of June 2024), for which only CBOs located in EDCs are eligible. ○ The Tribal Engagement Recommendations document incorporates these guidelines, and progress will be tracked in a distinct section of the five-year equity work plan.

<ul style="list-style-type: none"> i. Are community-driven, create a sense of ownership, and tap into community knowledge. j. Incorporate culturally relevant images and multilingual text when working with communities to develop meaningful and approachable signage at public access points. 	
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6. Accountability and Transparency

Guideline	Progress in FY 2023-2024
<p>Include additional equity metrics among the Authority’s performance measures; continue to track and report on these performance measures annually.</p>	<ul style="list-style-type: none"> ○ Provided yearly updates on equity work at public meetings of the Advisory Committee and Governing Board and in the Authority’s Annual Report. ○ Collaborated with the WRMP’s People & Wetlands Workgroup to expand and align equity-focused performance measures. ○ Shared Summary of Feedback from 2023 Community Outreach and Listening Sessions document with session participants, partner organizations, and other funders.
<p>Collect and analyze data on types of organizations, geographies, and programs where the Authority has made investments in order to identify potential gaps.</p>	<p>See <i>Next Steps and Preview of FY 2024-2025 Equity Work</i>.</p>

Next Steps and Preview of FY 2024-2025 Equity Work

In the coming year, Authority staff will continue work to implement the Equity Guidelines and further involve the AC in helping to implement equity actions and to evaluate progress and effectiveness. The forthcoming five-year equity work plan will have both tasks and progress tracking for actions recommended in the Equity Guidelines and Tribal Engagement Recommendations.

Staff will continue to visit EDCs located along the bay shoreline with the Governing Board and Advisory Committee to better understand issues and potential opportunities through tours of projects throughout the Bay Area. In prior years, staff hosted standalone virtual Networking Sessions, but staff have since focused on encouraging in-person networking during public Board

tours to alleviate time and capacity burdens on both community-based partners and Authority staff but still provide meaningful opportunities to connect.

Staff will release a Call for Applications to recruit for the Advisory Committee. The members have four-year terms, and half of them complete their respective terms every two years. In addition to the usual channels for outreach, staff will share the opportunity with representatives from historically excluded communities, youth leadership organizations, tribes, and tribal organizations to encourage diversity in the applicant pool.

Currently, staff are working on an equity gap analysis (referenced in “Accountability and Transparency”) to understand where Authority funding is missing the mark and will create a strategy to encourage grant applications and partnerships from these areas.

Staff appreciates the Governing Board’s interest in improving equity in the Authority’s programs and processes and welcomes feedback and direction.