

MEMORANDUM

DATE: September 5, 2025

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](#). Staff will report annually on progress on the 2025-2029 Equity Work Plan, which includes sets of tasks derived from the Equity Guidelines (Attachment 1) and [Tribal Engagement Recommendations](#).

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 Advisory Committee (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 AC approved the recommendations and presented them to the Governing Board, which passed [Resolution 70](#) and adopted short-term recommendations for implementing Measure AA to benefit EDCs and directed staff to report back annually on the Authority’s progress in implementing the recommendations. Most 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 AC and community-based organizations to develop them. The present memo details work completed in Fiscal Year (FY) 2024-2025 in the structure of the Equity Guidelines.

Authority’s Progress in Fiscal Year 2024-2025

In FY 2024-25, the Authority implemented the Equity Guidelines (Attachment 1) in four main ways: 1) continuing the Community Grants Program; 2) creating the Five-Year Equity Work Plan; 3) completing the Equity Gap Analysis; and 4) conducting early outreach to community-based organizations (CBOs), California Native American tribes and tribal organizations, and other priority groups. Staff is also involving AC members in implementing equity actions by presenting this report and asking them for feedback on future actions. The following narrative is supplemented by a detailed table below.

1) Community Grants Program. The Authority completed the fifth year of the Community Grants Program, which specifically funds CBOs in EDCs on a rolling basis. To date, the

Authority has funded nine community grants, totaling approximately \$1,699,713. More details on proposed and funded Community Grants can be found in Attachment 2.

- **FY 24-25 Budget and Projects Authorized to Date:** Building on the previous years of funded projects, the Authority allotted \$600,000 for the Community Grants Program for Fiscal Year 2024-2025. Staff received two eligible grant proposals in FY 2024-2025, and the Authority funded both: (1) Southeast San Francisco Shoreline Stewards Project by Literacy for Environmental Justice; and (2) Healing a Wounded Watershed with the Colma Creek Collective by San Bruno Mountain Watch.
 - **Achievements and Challenges to Date:** Increasing the maximum award to \$300,000 (which was originally \$100,000) has allowed CBOs to expand the scope of their projects and leverage other funding sources. The challenges of this program chiefly relate to grantees' familiarity with the types of documents needed before starting Authority-funded 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.
 - **Lessons Learned and Next Steps:** Past grantees have requested lenience on certain grant requirements, as they are barriers for lower-capacity organizations, which staff will investigate as part of the Five-Year Work Plan. 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) **Creation of Five-Year Equity Work Plan.** 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. Staff subsequently created a working draft of the Five-Year Work Plan for 2025-2029, containing discrete tasks for the six areas of the Equity Guidelines and Tribal Engagement Recommendations with associated metrics. Contents of the Work Plan are copied in the next section with status updates for fiscal year 2024-2025.
- 3) **Completion of Equity Gap Analysis.** Staff and the 2024 Sea Grant Fellow completed the first iteration of the [Equity Gap Analysis](#), which was presented to the Board at the June 6, 2025 meeting. The analysis identified geographic areas where staff should aim to solicit applications and resulted in potential actions to better address the gaps. The analysis can be repeated in the future as more projects are authorized, and as more social equity metrics come into play.
- 4) **Strategic Outreach for Request for Proposals.** For 2025, the ninth round of grant materials followed a similar template to previous years with a few minor updates, such as adding an explanation that non-federally recognized tribes can apply for grants as a nonprofit or with a fiscal sponsor. In 2024-2025, staff conducted outreach to priority groups before release of the July Request for Proposals (RFP). Informed by the prioritization criteria, Equity Gap Analysis, Tribal Engagement Recommendations, and comments from the Independent Citizens Oversight Committee (ICOC), staff sent information about the upcoming Authority grant round to the following audiences:

- Leaders of CBOs, particularly in Vallejo, East Palo Alto, Alviso, and Eastern Contra Costa County, per the Equity Gap Analysis;
- California Native American tribes and tribal organizations (with an informational flyer about funding and assistance offered by the Authority), per the Tribal Engagement Recommendations;
- Practitioners focused on shellfish and submerged aquatic vegetation, per Recommendation 2d of the [2023-2024 ICOC annual report](#); and
- City Managers from the Association of Bay Area Governments contact list.

Details on Implementation of the Equity Guidelines

As described above, the Authority implemented the Equity Guidelines during FY 2024-2025 in four main ways: 1) continuing the Community Grants Program; 2) creating the Five-Year Equity Work Plan; 3) completing the Equity Gap Analysis; and 4) conducting strategic outreach to priority groups before the RFP was released. In addition to these efforts, staff started implementing actions under the Tribal Engagement Recommendations and six categories of the Equity Guidelines. A description of how the actions listed in the Guidelines were addressed during the last fiscal year is provided in the table below from the working draft of the Five-Year Equity Work Plan.

Five-Year Equity Work Plan 2025-2029: Year 1 Progress

California Native American Tribal Engagement	Not Started	In Progress	Done
Partner with California Native American tribes and tribal organizations to improve representation for Advisory Committee and Oversight Committee member addition process for 2025-2027 and 2027-2029 (2-year cycles). This includes native and nonnative representatives who are embedded in and trusted by the tribal community and can share the tribal perspectives with these bodies when tribal members themselves do not have the capacity to join committees. (Representation)		X	
Prioritize projects that include environmental workforce development, including job training and internships, for the California Native Americans. (Representation)		X	
Investigate fellowship and internship opportunities with external agencies that specifically work with California Native American participants. (Representation)	X		
Engage in increased, ongoing, and meaningful outreach to California Native American tribes in the Bay Area, including streamlined communications to tribes related to Authority programs, projects, or other developments that are identified by tribes as topics of interest with the help of the Tribal Liaison. (Outreach & Partnerships)		X	
• Share annual Grant Round call for proposals directly with tribes to gauge interest and offer consultations for more information and technical assistance.		X	2025 done

Prepare plain language one-pager about grant programs to tribes. Provide clear guidance for tribes on what staff can provide as technical assistance.			X
Offer consultations specifically for tribes early in the grant cycle after preliminary list of projects has been released		X	2025 done
Revise Interim Tribal Consultation Policy based on process improvement guidance expected from California Natural Resources Agency. (Outreach & Partnerships)	X		
Allocate time and training resources for a designated Tribal Liaison and other staff to provide technical assistance to tribes. (Applications and Grants)		X	
Clarify internal roles around Tribal Engagement among SCC Tribal and Environmental Equity Liaison, Tribal Liaison, and project managers. (Applications and Grants)		X	
Develop and implement a method for prioritization of tribally led projects and projects with strong tribal partnerships, such as through application review or percentage of funds provided (Applications and Grants)	X		
Conduct internal training for the Board Chair, tribal liaisons, and staff on protocols for tribal consultation and engagement, and on key topics relevant to tribes of the Bay Area (for example, the history and ongoing impacts of colonialism, legislation and policies related to tribal sovereignty, and culturally sensitive and trauma-informed engagement). (Meaningful Engagement)		X	
Provide orientation to tribal topics to new Board members as part of the onboarding process.	X		
Ensure tribal liaisons and SFBRA staff have taken internal trainings on tribal engagement.		X	
Develop and implement requirement for projects that work with tribes to report on tribal engagement metrics and outcomes (Accountability and Transparency)	X		
Investigate the idea of creating a survey for Advisory Committee and Oversight Committee members as a way of measuring outcomes of increased diversity (i.e. feeling empowered to share perspectives, whether they feel their perspectives shape the grant program)		X	
Quantitative Metrics	0.06%		
% of Advisory Committee identifying as a tribal/indigenous representative			
% of the Oversight Committee identifying as a tribal/indigenous representative	0%		
# of interns from tribes	0/0		
# of projects with workforce development for tribes	0		
# of SFBRA Grant Program outreach events held by staff for tribes	0		

# of technical assistance activities provided to tribal applicants (formal consultations, other application help, introductions to partners, invoicing workshop, etc.) and outcomes (Not including government-to-government consultations)	1
# of grants distributed to tribes or fiscal sponsor of a tribe	0
# of trainings provided to SFBRA Governing Board and staff	0

The following six areas of work correspond to the [Equity Guidelines](#).

1. Representation	Not Started	In Progress	Done
Recruit diverse, equitable and inclusive representation for Advisory Committee and Oversight Committee member addition process for 2025-2027 and 2027-2029 (2-year cycles).		X	2025 done
Prioritize projects that include environmental workforce development to support increased diversity in the conservation field.		X	
Incorporate demographics analysis from Wetlands Regional Monitoring Program social equity findings to survey members of Authority staff and committees.		X	
Investigate fellowship and internship opportunities with external agencies that specifically work with participants from Environmental Justice communities. (Representation)		X	
Quantitative Metrics	51%		
% of the Advisory Committee members from historically/systemically excluded communities (self-identified)			
% of the Oversight Committee members from historically/systemically excluded communities (self-identified)	0%		
# of projects with workforce development	11		
# of interns from EDCs or Environmental Justice Communities	0/0		

2. Outreach and Partnerships	Not Started	In Progress	Done
Conduct outreach to potential Authority project proponents and partners, with a focus on: 1) building capacity for projects that include meaningful community engagement and provide tangible benefits to EDCs, 2) support for engaging and working with tribes, and 3) support for increasing accessibility to Bay shoreline restoration projects for people with disabilities.		X	
Refine outreach based on results of gap analysis in #6 (below).		X	2025 done
Host 1-2 community outreach listening sessions to reach communities identified in the gap analysis or other identified purpose to advance the tasks of this work plan.	X		

Attend 1-2 community events per year to expand outreach and identify new project proponents and partners.		X	
Conduct outreach to agencies and organizations engaged in habitat restoration in or near EDCs to assist them in forming partnerships with local CBOs, tribes, and other local experts.		X	
Coordinate networking opportunities for CBOs with landowners, restoration practitioners, and other potential partners. Hold two onsite events per year with project tour and networking		X	
Support CBO grantees to develop skills and capacities necessary to successfully manage government grant funding.		X	
Record a new grantee orientation webinar, provide live training if interest from 3+ new grantees.			X
Quantitative Metrics	0		
#community outreach listening sessions			
#community events attended by staff	1		
# of networking events in a year	1		
# of new grantee orientations	1		

3. Applications and Grants	Not Started	In Progress	Done
Improve application and grant processes to reduce barriers to participation and highlight equity and community engagement in grant program materials.		X	
Simplify RFP scoring section, shorten summary, and include a slideshow with the RFP to summarize eligibility and requirements.		X	
Investigate easing insurance requirements for projects with less liability and required term of landowner agreements for implementation projects.	X		
Improve the Authority website to ensure accessibility.		X	
Provide grantees with guidelines to compensate tribes for their participation and knowledge	X		
Coordinate GB and AC tours of current and potential shoreline restoration sites, including visits to EDCs along the bay shoreline, as networking opportunities for CBOs with landowners, restoration practitioners, and other potential partners.	(See overlapping task under #2)		
Improve technical assistance, such as workshops and/or individual consultations, in areas such as defining project scope, meeting grant requirements, and preparing invoicing documentation for CBOs in EDCs and tribes to support them in developing eligible projects and applying for grants.	(See overlapping task under #4)		
Quantitative Metrics	6		

# of technical assistance activities provided to applicants (consultations, other application help, introductions to partners, invoicing workshop, etc.) and outcomes <i>Other metrics will be captured under #4</i>	
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4. Meaningful Engagement	Not Started	In Progress	Done
Increase Authority staff interactions with CBOs and tribes to learn more about their interests, needs, and community engagement methods	X		
Host second Community Grants Cohort within 5-year period	X		
Recruit a tribal organization to join Cohort, if interested	X		
Seek ways for Authority funds to support work the community is already doing or interested in doing, e.g., meet with community leaders to identify how Measure AA funding can support their current and planned work.	X		
Identify community-based groups with the administrative capabilities to partner with smaller and/or grassroots organizations to apply for and manage a government restoration grant.	X		
Track changes made to project design and implementation as a result of community and tribal engagement in Project Lessons Learned document.	X		
Provide grantees with guidance on how to track this.	X		
Quantitative Metrics # of new projects that are community-led	2		

5. Project Benefits	Not Started	In Progress	Done
Track benefits per project that are being provided to communities with social equity metrics to be developed by the Wetlands Regional Monitoring Program's People & Wetlands Workgroup. For examples of benefits, see Section 5 of the Equity Guidelines .	X		
Report on these benefits in the annual Equity Update.	X		
Using data from gap analysis in #6 (below), identify organizations, geographies, and programs for EDCs that have not received as many benefits from the Authority to target outreach effort			X
Quantitative Metrics Benefits to EDCs are tracked in the Annual Report's Performance Measures Table by Project Type, Restoration metrics, Levee miles constructed, and Public Access metrics.	In progress, currently by program area benefits.		

6. Accountability and Transparency	Not Started	In Progress	Done
Report annually on progress toward achieving tasks in this work plan and performance measures.		X	
Add additional equity metrics to the Authority's performance measures.	X		
Collect and analyze data on types of organizations, geographies, and programs where the Authority has made investments in order to identify potential gaps. Use of this gap analysis is outlined in #2 and #5.			X
Evaluate progress of equity work following the tenth year of the Authority's grant rounds (2027) and consider what else should be measured.	X		
Quantitative Metrics # of Annual Equity Updates to Governing Board and Advisory Committee from this work plan.	1 - 2025		

Next Steps and Preview of FY 2024-2025 Equity Work

In the coming year, staff will continue to implement the Equity Guidelines and further involve the AC in helping implement equity actions and evaluate progress and effectiveness. The Five-Year Equity Work Plan will serve as a roadmap of actions recommended in the Equity Guidelines and Tribal Engagement Recommendations. For example, in June of 2025, staff recorded a Grantee Onboarding Webinar, which is available on the website and covers all the steps and requirements for managing a grant from the Authority after board authorization.

Staff will continue to visit EDCs located along the bay shoreline with the Governing Board and AC to better understand issues and potential opportunities through project tours. In prior years, staff hosted standalone virtual networking sessions. To alleviate time and capacity burdens on both community-based partners and staff, staff has since focused on in-person networking at public board tours that provides meaningful opportunities to connect. Staff will refer to the Equity Gap Analysis in this year's grant round reviews to demonstrate whether proposed projects would address gap areas and benefit EDCs compared with our previous funding.

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