



MAKING FUNDING ACCESSIBLE FOR ALL

Best Practices for Equitable Grantmaking

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Introduction

This document outlines best practices for making grants more accessible. Low-income communities face greater barriers to accessing public funding due to limited grant writing capacity, lack of staff or technical expertise, unnecessarily complex application requirements and limited access to matching funds. As a result, the communities most in need are often the least able to compete for resources, deepening cycles of underinvestment. Engaging early, often, and meaningfully throughout the grant process -- and centering community-led decision-making -- can help unlock solutions and ensure we are driving funding towards real needs.

I. Foundational Engagement Principles

- **Use plain language** that can be understood the first time they read it, in all outreach materials and applications.
- **Translate materials and interpret meetings** in the most commonly spoken local language(s). Be upfront if application materials must be submitted in English.
- **Do not require identification** to request interpretation headsets.
- **Hold meetings in trusted, safe locations**, at accessible times whenever possible and allow for virtual attendance.
- **Avoid requiring registration or sign-in sheets** that collect personal information.
- **Ensure staff understand and are sensitive** to the local history of the underserved communities they are working with and are prepared engage respectfully.
- **Provide technical support**, such as office hours where staff can connect with applicants on questions and/or to provide feedback.
- **Reconsider “black-out periods”** when the grant is open for solicitation and staff is not able to provide any advice and provide under-resourced communities time to develop applications.
- **Coordinate with fellow state agencies** and align grant program priorities and processes when feasible to ease administrative burden on community organizations.

- **Respect requests for confidentiality** when community organizations note sensitive information that warrants special protection.

II. Guideline and Program Development

- **Build in a public process** prior to every round of solicitation whenever feasible but be strategic about comment opportunities so you don't overwhelm community groups
 - **Store and refer to comments** from previous rounds in an easily accessible area. Comments can be applied to other programs within your department.
 - **Summarize past comments** and whether they have been incorporated in the draft guidelines.
 - **Be proactive and connect with other programs** to gather comments they've received and how they incorporated them into their guidelines.
 - **Coordinate the comment period** to align with other similar programs.
 - **Document guideline changes and why.** Post on the program's site and include in all communications requesting public comment.
 - **Ask communities about priorities** for funding, scoring and types of recommended expertise for grant panels during comment period for draft guidelines.
- **Maximize timeline flexibility** in solicitation opening and closing (e.g., early notice of solicitation, rolling deadlines, if possible, etc.).
- **Don't expect communities to understand how to navigate our processes.** State bureaucracy is complex. When possible, seek input/feedback on their terms and timelines.
- **Provide the scoring rubric** in the grant guidelines so applicants are aware of how their projects will be scored.
- **Share information** on the funding, draft grant guidelines, key policies, and other pertinent information as needed for community members and organizations to provide informed feedback.
- **Assure grant programs include minimum investments** and/or benefits to communities that need it most (e.g., at least 40% funding to disadvantaged and severely disadvantaged communities, etc.).
- **Be clear about how you are determining community status** and provide resources for prospective applicants to cite as needed (e.g., current designation of disadvantaged communities, geospatial tools, etc).
- **Set realistic award amounts**, including maximums that reflect the on-the-ground reality of what is needed to accomplish project activities that align with grant priorities. CNRA recommends soliciting feedback on grant award ranges to better understand from community organizations on appropriate and inclusive funding ranges.
- **Provide templates** for application materials (e.g., workplan, budget).

- **Provide advance payments of funding**, if allowed and requested by a grantee. Implement advance pay in a manner that meets grantee needs, improves program efficiencies, and limits risk to state funds.
- **If it is a reimbursement-only grant, consider allowing** grantees to submit requests for reimbursement when invoices are received from subcontractors and for other costs, so that grantees do not have to front the payments while waiting on reimbursement from the state, resulting in better cash flow for the grantee and faster payments to the subcontractor. If allowed, include that detail in the guidelines.

III. Pre-Solicitation

- **Host “office hours”** for applicants to ask questions before solicitation begins, record and post all meetings and any FAQs to assure everyone receives the information.
- **Record and post tutorials** if possible on how to develop a competitive application and/or use the grant management system to apply for the grant so applicants can reference it.

IV. Grant Application Process

- **Implement a phased application process** or a two-step application such as a short, high-level preapplication followed by an invitation to submit a full application.
- **Review your application process** with an eye towards reducing barriers. Is the language in your application and guidance materials clear and accessible? Could you offer pre-application consultations by phone? Would a pre-application save applicants and staff time by weeding out projects that are not a good fit?
- **Clearly communicate** required documents and anticipated grant application timelines to allow for better planning.
- **Inform applicants about state grants** and make sure they understand the requirements before they develop an application. These may include evidence of insurance, detailed invoices, progress reports, etc.
- **Notify non-profit organizations that their grant may be audited**, and audit teams will check to see that they are in good standing on various platforms, including but not limited to:
 - **“Active” status** through the California Secretary of State’s Business Search
 - **Up-to-date and accepted** filings through the Internal Revenue Service Tax Exempt Organization Search
 - **“Current” status** on the Department of Justice’s Registry of Charitable Trusts.
- **Provide examples of successful applications or project descriptions**, if information for a comparable project is available.

V. Eligible Costs

- **Provide a clear list of eligible and ineligible costs to avoid confusion from applicants.**

- **Allow line items that increase access and engagement**, such as participant compensation, translation and interpretation, transportation, childcare, and refreshments — as funding allows and in consultation with legal counsel.
- **Support capacity building** for smaller entities by allowing the purchase of equipment that serves a project goal and will serve a purpose beyond the grant term.
- **Offer flexible options for reimbursement of indirect costs** where possible. This allows grantees to use federally negotiated rates or rates tied to the grantee’s accounting methodology for day-to-day operations.
- **Allow for contingency or unprogrammed project allocations** within the grant budget and timeline, which provides organizations with greater flexibility should unforeseeable circumstances occur during the performance period of a grant (e.g., contractor rates are unexpectedly higher or an unexpected number of community members showing up)
- **Create a “Frequently Asked Questions”** document to direct applicants to and update regularly (i.e., after listening sessions and/or workshops) and note clearly on the title page and file name when it was last revised.

VI. Mapping and Evaluation *(if project location data was collected)*

- **Organize data** to show geographic diversity, applicant type, entity size, award status, and other categories as needed for your program.
- **Assess trends** to see where there are gaps and room for improvement. For example: What issues are affecting this area? Is there a funding gap? Can guidelines be made more inclusive of emerging issues? Is more targeted outreach needed? Which geographic areas are receiving significant funding, and which communities have received less?

VII. Grant Agreement Execution

- **Communicate key steps and timeline estimates** to the grantees (what documents need review and feedback from grantee, how long reimbursement processes take, etc.).
- **Articulate what is within the grant team’s programmatic purview** and what other processes are outside of the team’s control (e.g., timelines for processing payment requests).
- **Offer help and support** throughout the grant lifecycle.

VIII. Grant Reviewing and Awards

- **Build in fairness in how proposals are reviewed and scored** for planning grants that require collaboration with local government to help avoid disadvantaging applicants working in challenging political environments. Many environmental justice organizations have encountered governments unwilling to partner with them.

- **Implement partial funding awards** so projects that are not as competitive can receive some funding and connect applicants to other grant programs that can contribute additional funding.
- **Connect with other relevant grant programs** before solicitation to gauge if they are interested and have the capacity to receive applications that are not funded.
- **Recruit a range of subject matter experts** to serve as reviewers, including technical experts, people with life and work experiences relevant to the grant program, and those who have worked with underserved communities.
- **Provide grant reviewers with training**, relevant definitions, contextual information and materials to help them effectively prepare for application reviews.
- **Note important “must haves”** in the reviewer guide, such as community/student stipends, language accessibility, accessible community meetings, and more.
- **Host office hours** throughout the grant review process for any reviewers that may have questions. Consider office hours at lunchtime or after working hours to account for groups that may have other obligations during the day.
- **Convene a forum for reviewers** to discuss projects that had a large standard deviation to understand why scores varied so much among reviewers, enable reviewers to learn from each other and update scores if needed.
- **Consider using normalized scores** to adjust for reviewers that may have been more lenient or more stringent in their scoring. Other methods include using qualitative comments or tiered rankings. Experiment with what works for your grant program.

IX. Grant Administration

- **Utilize similar agreement language** as aligned programs. If this isn’t possible, make note of any differences and/or changes to the program’s agreement language.
- **Develop a Grantee Manual** that centralizes all the information, forms, and requirements for grantees to manage their grants successfully.
- **Implement creative reporting and invoicing** grant administration practices to help eliminate burden on community organizations. For example, grant administrators could regularly meet with grantees, prepare invoice forms, perform edits and/or talk about grant execution progress in real time.
- **Provide simple reporting templates** that can be expanded on with conversation as needed.
- **Provide regular opportunities** to connect with grantees informally to build relationships. This direct line of communication builds trust and supports transparency.
- **Connect with legal counsel** to determine which administrative requirements are mandatory and where there may be flexibility.
- **Be very clear internally** about requirements, processing timelines, and efficient communication channels.

- **Allow for some flexibility** to execute a grant in case of unforeseen issues, such as natural disasters and other emergencies (e.g., wildfires required evacuation, flooding in the community, etc.).

X. Post-Award Engagement

- **Coordinate with other state programs** if possible, to address needs identified in an application that may have been declined to help ensure we address long-term issues impacting communities in creative ways and continue building trust.
- **Provide an opportunity** to connect with applicants who did not receive an award. Provide themes from the review and areas for improvement if possible.
- **Provide space for the applicant to speak to their experience** of the program. Note any comments for program improvement.
- **Connect applicants who did not receive an award with other grant programs that match applicant's needs.** Where possible, promote interagency communication for prospective funding.