

Policy Grant Orientation Guide 2022-24

Welcome to the Partnership for the Bay's Future (PBF)! We're excited to work with you towards achieving your affordable housing production and preservation policy goals over the next two years. This guide provides information to help you and your site team (government entity + CBOs + fellow) orient to the program and get off to a strong start.

PBF equips Policy Grantees with several resources meant to support site teams during your policy development and implementation processes. These resources include:

- **A housing fellow who works full-time on Policy Grant objectives.** PBF Fellows are placed at their host governments and advance the site team's shared workplan, including aligning and liaising between government and community partners.
- **Grant funding (\$220,000 over two years) to support community partners in this work.** Each community partner team receives \$110,000 in grant funding per year, with the ability to earmark a percentage of these funds for lobbying activities related to their team's policy proposals.
- **Access to the Technical Assistance (TA) Fund (\$150,000 for the entire cohort over the two-year program).** This fund supports site teams hiring expert consultants for discrete projects such as messaging and communications support, data analysis, polling support, and policy strategy.

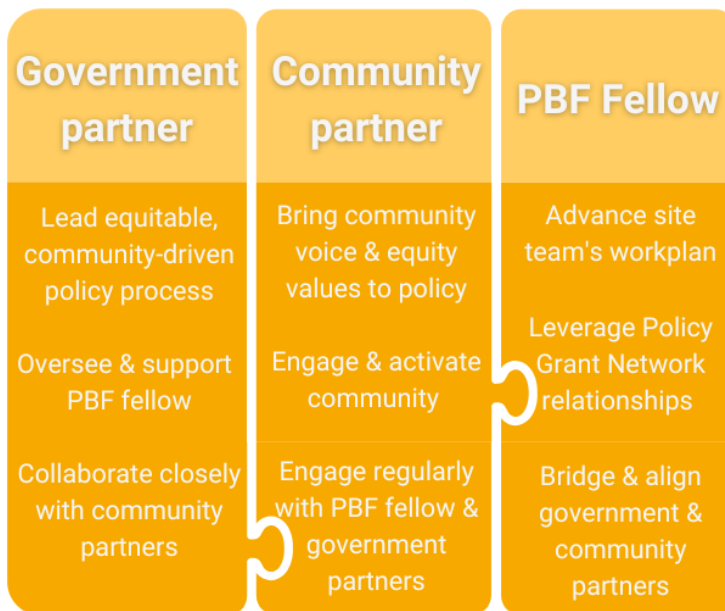
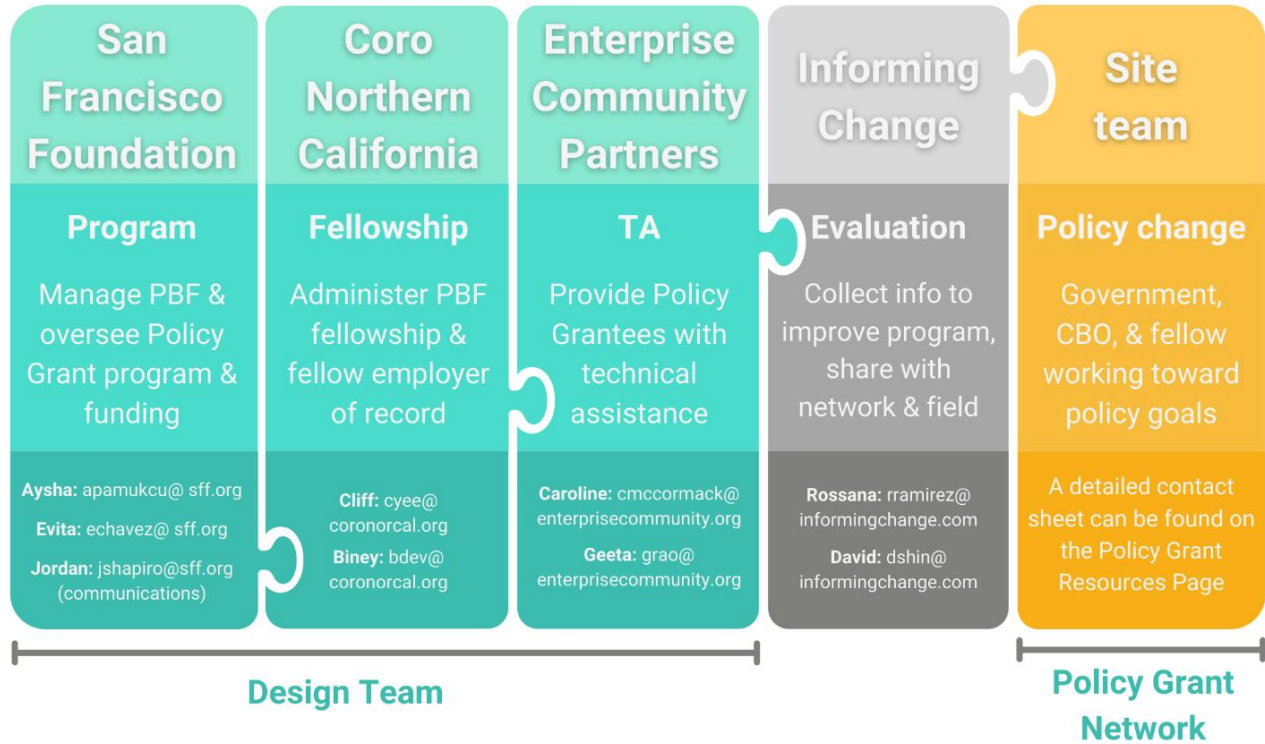
Additionally, PBF can support your policy efforts in the following ways:

- **Strengthening your communications.** The PBF team can promote events, publications and other material on our platforms, as well as provide copy editing and consulting support on communications projects.
- **Supporting policy advocacy.** As a Policy Grant Network member, you can request additional support from PBF as your policy moves through the legislative process, such as support letters and public comment.
- **Coaching and professional development for PBF fellows.** PBF fellows receive training and support to strengthen their leadership and effectiveness.
- **Connecting to Policy Grant and PBF advisory groups.** You have access to a powerful peer and extended network. The Policy Grant Network (all site teams) will be regularly convened, with opportunities to join smaller groups, such as who share your role (eg, all government staff members) or those working on similar policies.

Please visit our [Policy Grant Resources](https://baysfuture.org/home/policy-grant-resources) page (baysfuture.org/home/policy-grant-resources) for more details about these supports and how to access them.

The Policy Grant Teams

Each partner has a specific role that makes the Policy Grant program a success:



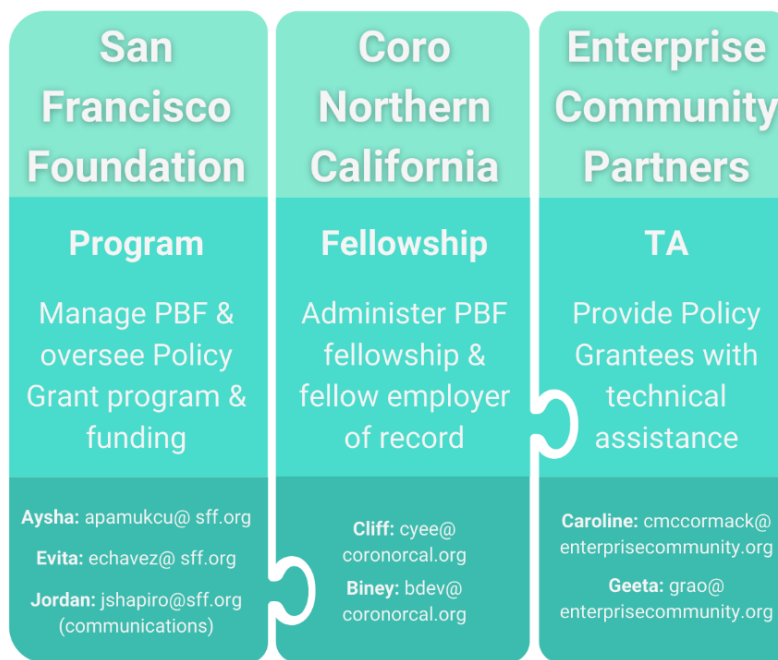
The Policy Grant Network

11 site teams make up the Policy Grant Network. This is a strong group of housing policy experts who can support you as you pursue your policy goals. Site teams are a unique partnership that can leverage their relationships across government and the community to make equitable policy change. The most successful partnerships communicate regularly and refer often to their shared workplan and milestones. If you encounter challenges in advancing your work as a site team, connect with the Design Team for help.

The Policy Grant Design Team

The Policy Grant Design Team collectively works to ensure the success of the program. The Design Team will be checking in with government and community partners on a six-month cadence, and we encourage you to reach out if you need additional support or if issues emerge.

These are the Design Team's different roles:



San Francisco Foundation

SFF manages PBF and leads programming and grant funding. When in doubt, bring questions and comments to this team.

Coro Northern California

Coro is the Fellowship administrator and manages fellows' professional and leadership development. They are the primary contact for fellow activities.

Enterprise Community Partners

As TA providers for the Network, Enterprise shares content expertise in housing policy, finance, and program design. They manage the TA fund as well as provide training and coaching.

Expectations for the Policy Grant Network

PBF's expectations for successful participation help ensure that you and your site team get the most out of the Policy Grants.



**Participate
fully**

**Embrace
partnership**

**Set your
team up for
success**

**Share timely
updates with
SFF**

**Contribute to
evaluation
and feedback**

- 1. Participate fully.** This will help you get the most value out of the Policy Grants:
 - Make good-faith efforts to send three representatives from your site team (PBF fellow, government staff, and CBO staff) to every Policy Grant Network convening.
 - Meet with others who share your role. At least one representative should be present at separate role-alike convenings that will be held for PBF fellows, government partners, and community partners.
 - Government and community partners will check in with the SFF team for a grant report every spring to share updates and policy progress.
 - Be proactive about leveraging the resources available to you, such as Network peer support, the Technical Assistance Fund, and communications coaching.
- 2. Embrace partnership.** Collaboration is one of the founding principles of PBF. To succeed in your policy goals will require working closely with your site team and building trusting relationships. Additionally, be proactive about finding opportunities to collaborate across the Policy Grant Network, the PBF community, and the larger SFF grantee community.
- 3. Set your team up for success.** The strongest teams have frequent touch points and regularly revisit their workplans. Each site team should develop a regular meeting cadence, collaborate on a shared workplan and to align on a collective vision of success for their policy project. PBF Fellows play a central role advancing the site team's goals.
- 4. Share timely updates with SFF.** Share your milestones and troubleshoot challenges with SFF so we can be partners in communication. SFF can help with your campaigns, amplify messages and events on our platforms, and share learnings with the sector.
- 5. Contribute to evaluation and share feedback.** Participate in program evaluation, which collects information for learning purposes. Beyond that, we encourage you to share feedback with the SFF team about what is working and what can be improved.

Site Team Roles and Collaboration

Each member of the site team plays an important role in achieving the team's shared policy goals. In addition to the expectations for the Policy Grant Network as a whole, these are the expectations and recommendations that are specific to each role.

Government partner

Government partners are looked to as leaders and guides of the legislative process. They support the PBF Fellow in navigating the internal process of government and collaborate closely with their community partners to ensure community voice drives their proposed policies. The following are their roles:

Oversee PBF Fellow

- Host the PBF Fellow and oversee their daily work. Communicate as needed with Coro, the fellowship administrator, about supervision needs and updates.
- Serve as the Fellow's onsite supervisor, providing guidance, feedback, and support. This includes but is not limited to orienting the Fellow to their new workspace and making introductions to key stakeholders.
- Provide Fellow with the resources they need when working onsite to be successful, including a functional workspace and necessary equipment.
- Ensure that Fellow's time is fully allocated to advancing Policy Grant work, including participating in Fellow-specific programming.

Lead equitable, community-driven policy process

- Collaborate closely with the community partner(s) and Fellow to develop policy proposals and workplans to be advanced. Government partners should also work with community partner(s) on a shared strategy for the Fellow's time with each partner.
- Activate and build civic and political will for the adoption and implementation of equitable affordable housing production and preservation policies, in collaboration with the community partner(s) and Fellow.
- Provide content expertise in housing policy and governmental process and context.

Communicate with the PBF team

- Check in with SFF every spring for conversation-based grant reports. These grant reports take the form of a conversation with SFF, but if preferred, a written report may be submitted instead. Questions for the conversation will be shared ahead of time.
- Update SFF if there are any significant changes to the Policy Grant project proposed in the grant application, such as delayed timelines or shifts in policy priorities.
- Share any milestones, upcoming events, and media with SFF.
- Actively participate in evaluation efforts led by Informing Change.

Community partners

Community partners ensure the community's voice is represented in the policy process. As partners in the Policy Grants, they support the PBF Fellow by helping them understand local context and build trust with the community, as well as providing input for the policy development process. Community partners play a key role in outreach and education for both local stakeholders and their government partners. The following are their roles:

Engage regularly with PBF fellow and government partners

- Designate at least one staff member to serve as the Policy Grant point person. The point person should regularly engage with Fellow to provide guidance, feedback, resources, and support.
- Collaborate with Fellow and government partner to design and pass policies tailored to populations at greatest risk for displacement.
- Collaborate closely with the government partner and PBF Fellow to create and implement the Fellow's work plan.

Bring community voice and equity values to policy

- Work with the government partner and the local community to identify equity-centered policy priorities, gather input, and drive policy/advocacy work.
- Ensure that the voices and priorities of community members most at risk for displacement are part of the policy process.

Engage and activate the community

- Engage, educate, and activate the community – especially those who may not traditionally have had a seat at the policy table – for support of the site team's policy goals.

Communicate with the PBF team

- Check in with SFF every spring for conversation-based grant reports. These grant reports take the form of a conversation with SFF, but if preferred, a written report may be submitted instead. Questions for the conversation will be shared ahead of time.
- More frequent, informal check-ins are encouraged as needed for key updates or troubleshooting.
- Share any milestones, upcoming events and media with SFF.
- Actively participate in evaluation efforts led by Informing Change.

PBF Fellow

PBF Fellows play a central role in advancing their site team's shared goals. As the bridge between government and community partners, Fellows help their site team work together effectively. Fellows support regional collaboration and Policy Grant Network success by sharing resources and learnings with other Fellows and site teams. The following are their roles:

Advance the team's workplan

- Facilitate and champion the development, adoption, and implementation of their site team's policies in collaborative partnership with community and staff from departments across their jurisdiction.
- Provide government partner with staff capacity to execute Policy Grant workplans.

Bridge and align government and community partners

- Steward the relationships and help ensure a successful collaboration between government and community partner(s).
- Serve as institutional memory for the policy proposal and workplan, helping both partners maintain alignment in next steps and final goals.

Be an active participant in the PBF Fellow cohort

- Attend PBF Fellow-specific programming, such as monthly Fellow meetings and regular one-on-ones with Coro.
- Proactively reach out to Enterprise regarding any technical assistance needs.
- Share learnings, networks, resources and tools that may be helpful for other Network members as they advance their team's policy workplans.
- Serve as a liaison between their site team and Design Team. Examples include identifying a technical assistance need and submitting a request to the TA Fund, and contributing to communications efforts.
- Contribute at least one blog piece during their two-year fellowship, with further contributions encouraged. Storytelling is a key piece of advancing policy.

Leverage Policy Grant Network relationships

- Contribute to PBF activities, such as the Policy Grant Network convenings, communications content, and evaluation efforts.
- Proactively connect with SFF to share important updates, troubleshoot issues, or request resources.
- Actively participate in evaluation efforts led by Informing Change.

Who's Who at the Partnership for the Bay's Future

PBF is made up of a large team of partners all working together to make equitable policy change. This table will help you get familiar with the different parts of PBF.

Partnership for the Bay's Future (PBF)	PBF is managed by the San Francisco Foundation and LISC Bay Area. SFF oversees the Policy Fund and Policy Grant program while LISC manages the Family of Loan Funds to facilitate loan programs for the development of affordable housing.
Policy Grants	<p>The Policy Grants are two-year long grant programs that support government/community partnerships pursuing equitable policy initiatives related to affordable housing.</p> <p>The 2022-24 Policy Grants focus on production and preservation and were previously called "Breakthrough Grants." The 2020-22 Policy Grants were called "Challenge Grants" and focused on protection and preservation.</p>
Site team	The government partner, community partner(s), and fellow that make up an awarded Policy Grant team.
Policy Grant Network	All site teams of the Policy Grants.
Design Team	Comprised of Coro, Enterprise, and the San Francisco Foundation, the Design Team coordinates Policy Grant programming.
PBF Fellow	A housing expert placed with the government partner to help facilitate the creation and implementation of policies as well coordinate collaboration between partnered community organizations and the government, and between different site teams.
Government partners	Government entities participating in Policy Grant programs, committed to working with a community partner and PBF fellow. Government partners take the lead on policy initiatives and work in collaboration with community partners to ensure the policies reflect community needs.
Community partners	Community-based organizations partnered with a government entity participating in Policy Grant programs. Community partners receive grant funding of \$220,000 over two years, and work alongside a PBF fellow to conduct community engagement and advocacy work in pursuit of a policy initiative. Community partners may lobby to advance the team's policy goals.
Technical Assistance (TA) Fund	The TA fund provides \$150,000 over two years for site teams to draw on for discrete projects, such as hiring a consultant for an economic development report or a PR firm for campaign materials.

Policy Grant Network 2022-2024

Policy Partnership	Housing Policy Goals
<p>City of Antioch <i>in partnership with</i> Multi-Faith Action & Hope Solutions PBF Fellow: Meredith Rupp</p>	<p>Produce a General Plan and Housing Element that promote and facilitate the preservation and production of affordable housing by 1) leveraging unused faith-based organization land 2) zoning ordinance reform 3) building permit fee reform 4) encouraging accessory dwelling units for low-income homeowners</p>
<p>Bay Area Housing Finance Authority <i>in partnership with</i> Urban Habitat, Bay Area Community Land Trust, & Unity Council PBF Fellow: Sharron Watts</p>	<p>1) Regionally-networked preservation convenings 2) state legislative proposal to allow jurisdictions to count preserved units toward Regional Housing Needs Allocation (RHNA) goals</p>
<p>City of Berkeley <i>in partnership with</i> Healthy Black Families PBF Fellow: Gail McGuire</p>	<p>1) Community-driven, equitable development at 2 BART stations, with supportive policies such as right to return and local preference 2) innovative funding to raise \$500M for development at BART sites 3) build replicable model for reparative work</p>
<p>Contra Costa Housing Authority <i>in partnership with</i> Richmond Our Power Coalition, Community Housing Development Corporation, & Richmond LAND PBF Fellow: Hannah Phalen</p>	<p>Repositioning public housing project, Las Deltas, through 1) preference policy 2) create homeownership opportunities for Las Deltas with community land trusts, co-ops and condos 3) streamline approvals for Las Deltas 4) create new financial instruments</p>
<p>City of East Palo Alto <i>in partnership with</i> EPA CAN DO, YUCA, CLESPA, & PAHALI PBF Fellow: Benjamin Toney</p>	<p>1) Continued work on the city's Opportunity to Purchase Act, including implementation and fund and resource development. 2) co-op ownership opportunities 3) tenant network education and empowerment</p>
<p>City of Mountain View <i>in partnership with</i> SV@Home & Housing Trust Silicon Valley PBF Fellow: Trisha Gonzalez</p>	<p>Develop and implement: 1) A housing funding strategy, including new revenue sources 2) a displacement response strategy, including an acquisition program, requirements for replacing demolished units, and evaluating other potential policies such as TOPA/COPA 3) an outreach strategy to facilitate systems change</p>
<p>City of Oakland <i>in partnership with</i> Richmond Neighborhood Housing Services PBF Fellow: Gregory Earnest</p>	<p>1) Implementation of new policies and programs to support emerging BIPOC housing developers, such as streamlining affordable housing production 2) Build a pipeline of properties for emerging BIPOC developers with tax-defaulted and foreclosed properties</p>
<p>City of Richmond <i>in partnership with</i> Richmond LAND PBF Fellow: Kaitlyn Quakenbush</p>	<p>1) Design and implement strategies to enable community land trusts to acquire city land 2) create inventory of vacant and blighted property 3) create a Community Land Policy Package that encourages and enables production of permanently affordable housing</p>
<p>City and County of San Francisco <i>in partnership with</i> Urban Land Institute PBF Fellow: Hannah Groce</p>	<p>Revision of the city's request for proposals process, underwriting guidelines, and other internal processes to support emerging BIPOC developers</p>
<p>City of San Jose <i>in partnership with</i> SOMOS Mayfair PBF Fellow: Heather Bromfield</p>	<p>1) Continued work on the city's Community Opportunity to Purchase Act, including implementation 2) passage of a tenant preference policy</p>
<p>City of South San Francisco <i>in partnership with</i> Housing Leadership Council PBF Fellow: Danielle Thoe</p>	<p>A suite of preservation policies and programs to achieve the City's anti-displacement goals, which may include 1) requiring smaller multi-family owners to offer housing stock to affordable housing providers first 2) programs to acquire, rehab, and deed restrict naturally occurring affordable housing units</p>

PBF Messaging Quick Reference

About the Partnership for the Bay's Future (PBF). PBF is an innovative and collaborative effort using racial and economic equity as the guiding influence to ensure the Bay Area is a place where everyone can live in vibrant, inclusive communities of racial and economic diversity. PBF works to produce and preserve affordable housing and support protections for renters across the Bay Area.

Because the housing affordability crisis requires comprehensive, multi-pronged solutions, PBF pairs game-changing policies with innovative investment to change the systems and policies that have put the Bay Area beyond the reach of too many individuals and families.

On the policy side, PBF's Policy Grants provides local governments and community partners with much-needed capacity and expertise to implement equity-centered affordable housing policies. This process ensures those usually excluded from the policy process are at the center of efforts for change.

In response to missing financial products, PBF's Family of Loan Funds pilots new financial products designed to address the lack of affordable homes – a reality that disproportionately impacts households of color – and overcomes barriers throughout the Bay Area's rental housing market.

Combining policy with investment allows these two teams to work under one initiative to collaborate and inform one another. By bringing together leaders across sectors to develop solutions and build lasting political will, it creates an enabling environment to help affordable housing go from concepts to powerful and effective results.

Message Priority #1: Cross-sector collaboration. PBF brings together leaders from our communities, our businesses, local philanthropies, and our government to find the solutions to ensure that people of all backgrounds and economic statuses can call the Bay Area home. Our goal is to increase housing affordability for all and ensure vibrant communities of racial equity and economic inclusion.

Message Priority #2: People at the center of the 3Ps. We want all Bay Area families to have stable, affordable homes. We believe that protection, preservation, and production together will make the difference. We designed PBF to leverage investment and policy change to help families stay in the Bay Area communities where they connect, contribute, and prosper.

Message Priority #3: Prioritizing community. We value homes so families can live and grow as part of the fabric of a vibrant, thriving community. PBF is helping Bay Area residents to create and preserve the neighborhoods, communities, and cities that reflect our region's rich culture and are home to people of all different races and backgrounds. We can create the Bay Area we want by forming partnerships, advocating for policy change, and consciously investing in housing solutions that work for all Bay Area residents.

Message Priority #4: Our vision for a just and inclusive Bay Area. We envision a Bay Area where people of all ages and from all different cultures and backgrounds have an affordable place to call home, and where we live in communities where all people can feel they belong. This is a place where children and elders alike can thrive no matter what zip code they live in.