

SOCIAL EQUITY IN CALIFORNIA CLIMATE CHANGE GRANTS: MAKING THE PROMISE REAL

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EXECUTIVE SUMMARY

WHY:

California offers many funding opportunities to help address climate change and move us to a clean energy economy. Climate change grant programs can provide multiple benefits, including improved air quality, lower electricity costs, improved health outcomes, and green job opportunities. However, these benefits often fail to reach low-income communities of color—even though these communities tend to live in the most polluted neighborhoods and stand to greatly benefit from the improved environmental and economic conditions that clean energy resources can provide.

- Decades of racist policies like redlining led to low-income communities of color being restricted from economic growth and wealth creation and resulted in the

disproportional siting of polluting facilities such as oil and gas refineries and emissions-generating infrastructure like highways in or around low-income communities of color.

- A comparison of the current CalEnviroScreen map of the most polluted and economically disadvantaged communities with a map of communities of color shows astonishing similarities.
- If we do not ensure all communities are included in the transition to a clean energy economy, we seriously risk repeating the harmful injustices of a fossil fuel economy. Climate change grant programs represent one way to level the playing field and make clean energy benefits reach all communities, but they must be designed intentionally with equity.

HOW:

To intentionally include social equity as a core component in climate change grant programs and achieve the most equitable outcomes, social equity must be embedded in all parts of a grant program. Based on The Greenlining Institute's experience working with the [California Sustainable Energy Entrepreneur Development Initiative](#) (CalSEED) and other grant programs, this framework provides strategies on how to embed equity in the following four aspects of program design:

- **Goals, Vision, Values:** When social equity is incorporated into a grant program at its inception, it will more likely be prioritized in the procedural aspects of a program and in program implementation. The program's goals, vision and values should explicitly state the equity goals it intends to achieve and specify the communities it intends to benefit.
- **Process:** Grant programs should include diverse program partners with social equity expertise and offer technical assistance to ensure applicants from all backgrounds have the tools to submit a competitive application. This framework includes strategies on community partnerships, inclusive outreach, technical assistance, and application development.
- **Implementation:** A project is only as good as its implementation, which is why equity must be at the center of project implementation. Grant program staff should ensure awardees have the resources and tools necessary to maximize the environmental and economic benefits in their project and minimize any unintended negative consequences. Programs should target community-identified needs, address unintended consequences, and communicate their success stories. When businesses are eligible applicants, programs need specific strategies for workforce diversity and inclusion.
- **Analysis:** Grant programs must clearly define their social equity goals and develop evaluation criteria to track success. The analysis should indicate the strengths and areas for improvement in meeting equity goals and should be used to inform the direction of

the program moving forward. Programs must plan proactively to collect the data needed to evaluate their success or shortcomings in meeting social equity goals.

By intentionally including social equity as a core component in climate change grant programs, we can better ensure that environmental and economic benefits reach the communities that suffer first and worst from environmental injustices.

I. INTRODUCTION

California offers many grant opportunities, such as programs funded by the Electric Program Investment Chargeⁱ and California Climate Investmentsⁱⁱ that help accelerate the state's transition from an extractive, fossil fuel-based economy to a clean energy economy. However, low-income communities of color, which suffer first and worst from climate change impacts, are often overlooked and not included in the transition to a green economy. Clean energy funding opportunities are often inaccessible to low-income communities of color, and the environmental and economic benefits that clean energy programs provide often fail to reach them even though they often live in the most polluted communities and could benefit the most from clean energy resources.ⁱⁱⁱ As California continues to transition to a clean energy economy, it must place equity at the forefront of clean energy investments and prioritize benefits to low-income communities of color that are on the frontlines of climate change.^{iv}

Embedding social equity^v in climate-related grant programs will not only help the most polluted and under-resourced communities leapfrog to a clean energy future but can also help address the environmental and economic injustices these communities face. By developing inclusive funding opportunities that deliver benefits to California's most impacted communities, California can emerge as a leader not only in climate policy but in social equity as well, setting an example for other states and the federal government to follow. By not doing so, we risk repeating the injustices of a fossil fuel economy in which low-income communities of color are disproportionately impacted by dirty fossil fuels.

The Greenlining Institute works with many grant programs that helped grow our understanding of how to operationalize equity principles in grant programs. Greenlining works on the following grant programs that will be referenced throughout this framework:

- The [California Sustainable Energy Entrepreneur Development Initiative](#) (CalSEED) is a funding and professional development program for innovators and entrepreneurs working to bring early-stage clean energy concepts to market. Powered by the California Clean Energy Fund's mission to create a clean energy economy for everyone, CalSEED supports diverse entrepreneurs who deliver equitable outcomes from their cleantech innovations. CalSEED is a funding initiative of the California Energy Commission's EPIC program.
- The [Transformative Climate Communities Program](#) (TCC) funds development and infrastructure projects that achieve major environmental, health, and economic benefits

in California's most disadvantaged communities. TCC is one of many programs funded through California Climate Investments.

- The [Social Equity Forest Improvement Grant Program](#) is another California Climate Investments-funded program that funds tree planting projects across California to reduce greenhouse gases. For 2019, the program places a significant focus on supporting projects located in disadvantaged and low-income communities, and 30 percent of its funds will be open to state-wide competition in all communities.

Working with these grant programs, Greenlining has learned that social equity must be embedded in *all* parts of a program to achieve the most equitable outcomes. This framework offers strategies for grant administrators on how to embed social equity in climate-related grant programs, as well as resources and best practices for grant awardees to achieve equitable outcomes in their project. While we have focused on California, the principles behind these recommendations can apply anywhere. Using Greenlining's "Operationalizing Equity" structure, we will provide guidance on how to implement equity in the following four categories that apply to grant programs:

Operationalizing Equity Structure:

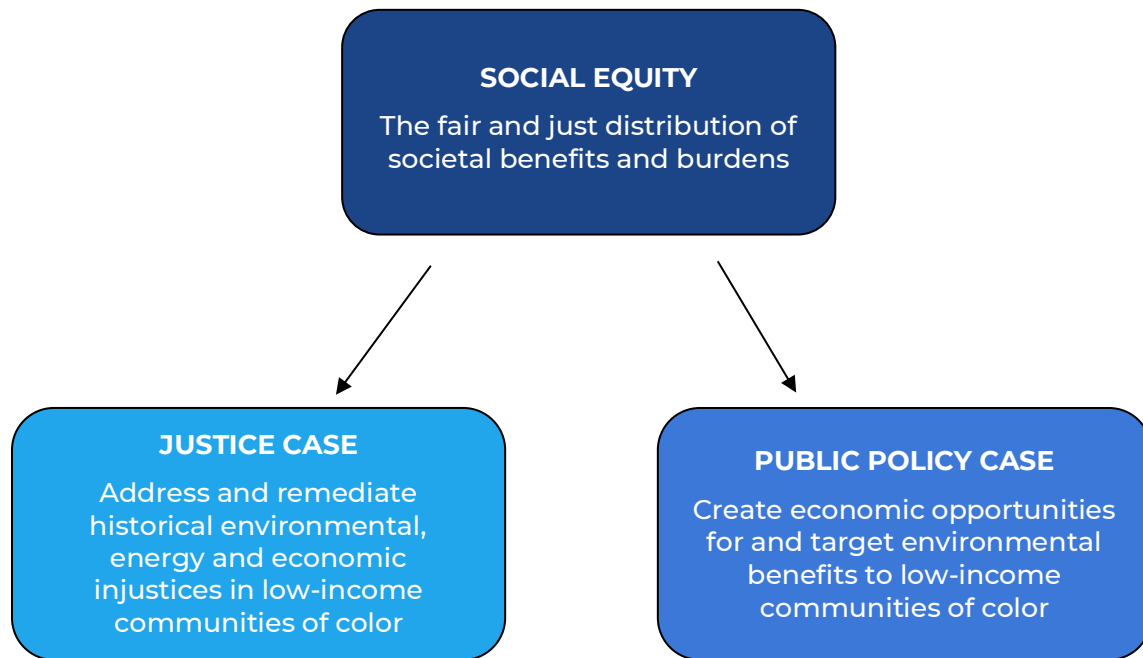
1. **Goals, Vision, Values**—How is equity described in the context of the overall goal of the project or initiative? Is equity a core component? Is equity missing?
2. **Process**—How does the project or initiative propose to deliver outcomes with equity as a focus? How are decisions made or influenced by communities that have less political power or voice?
3. **Implementation**—How will implementation lead to equity outcomes? What are the explicit equity outcomes described in the project or program?
4. **Measurement and Analysis**—How is equity progress measured? How do we know that equity goals were achieved?

II. WHY SOCIAL EQUITY MATTERS

For the purposes of this framework, we define social equity as the fair and just distribution of societal benefits and burdens. The reasons for embedding social equity in climate-related grant programs fall into two broad categories:

1. **The Justice Case**—The negative impacts of decades of racist policies like redlining led to low-income communities of color being restricted from economic growth and wealth creation and resulted in the disproportional siting of polluting facilities such as oil and gas refineries and emissions-generating infrastructure like highways in or around low-income communities of color. Grant programs can reduce these inequities by prioritizing investments to address the pressing environmental and socioeconomic issues low-income communities of color face.

2. **The Public Policy Case**—California is leading the way in climate policy and has policies that advance equity. Grant programs should complement these efforts and focus on targeting investments and direct benefits to low-income communities of color that have been left out of environmental and economic opportunities and programs. In doing so, California can set an example for the rest of the country.



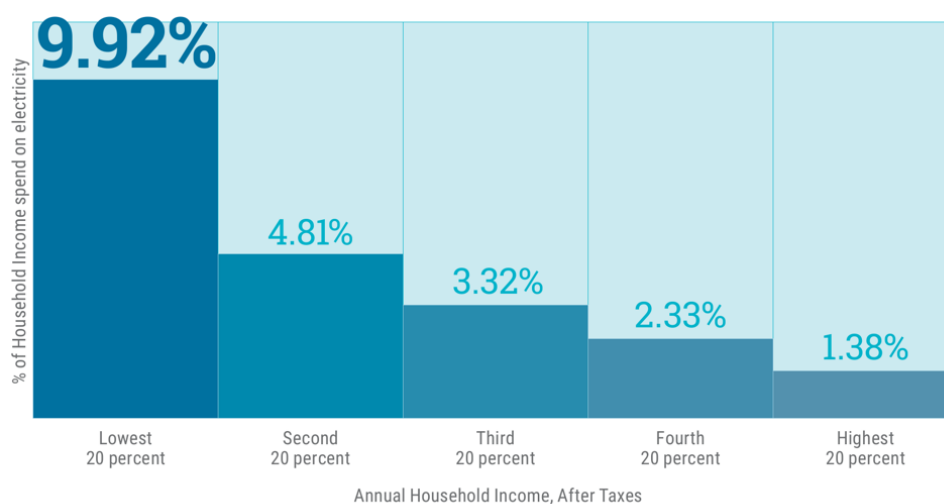
THE JUSTICE CASE

For a climate-related grant program to uphold social equity, it must advance solutions that actively address historical environmental, energy, and economic injustices that low-income communities of color have faced for decades. Today, low-income communities of color face many injustices largely due to discriminatory policies such as redlining,^{vi} which was the explicit and systematic practice of excluding communities of color from economic opportunities. Redlining took on many forms, including denying creditworthy applicants a loan for housing based on their race even though the applicants may otherwise have been eligible for the loan. Although the practice became illegal in 1968 with the passage of the Fair Housing Act,^{vii} modern-day redlining persists in subtler forms. For instance, African Americans and Latinos currently continue to be routinely denied conventional mortgage loans at rates far higher than their White counterparts.^{viii}

Decades of underinvestment led to a lack of economic growth and wealth creation in low-income communities of color and can still be seen today: Low-income communities of color often have high levels of poverty and air and water pollution; they pay disproportionately high costs for energy, transportation and basic necessities; and lack access to quality job opportunities.

Environmental and energy inequities remain prevalent in low-income communities of color. The bottom 20 percent of earners spend almost 10 percent of their income on electricity, more than seven times the portion of income that the top 20 percent pays^{ix}—leaving them with less income to cover basic necessities like rent and food.

Graphic 1: Source - [City Lab](#)^x



The lowest segment of earners pays considerably more of their income for electricity than higher earners. // Groundswell

These neighborhoods also feel the worst impacts of pollution yet are home to more fossil power plants than solar farms.^{xi} And although rooftop solar and energy efficiency investments could reduce pollution in low-income communities of color, most of these technologies are only available for homeowners, not low-income residents who are often renters.

How can climate related grant programs address environmental and energy inequities? They can begin to address these inequities by funding innovative projects that reduce the high cost of energy, create healthier environments, and promote clean energy technologies that are relevant to low-income communities of color.

Discriminatory practices also left low-income communities of color with **economic inequities**. Redlining prevented people of color from obtaining home and business loans, and this barrier to accumulating wealth still has rippling effects today, most visible in the racial wealth gap.^{xii} Even as recently as 2016, median Black wealth was less than 10 percent of median White wealth.^{xiii}

How can climate-related grant programs address economic inequities? Climate-related grant programs can help close the racial wealth gap by targeting climate programs in low-income communities of color and by funding projects that promote quality job opportunities and job training programs,^{xiv} especially for

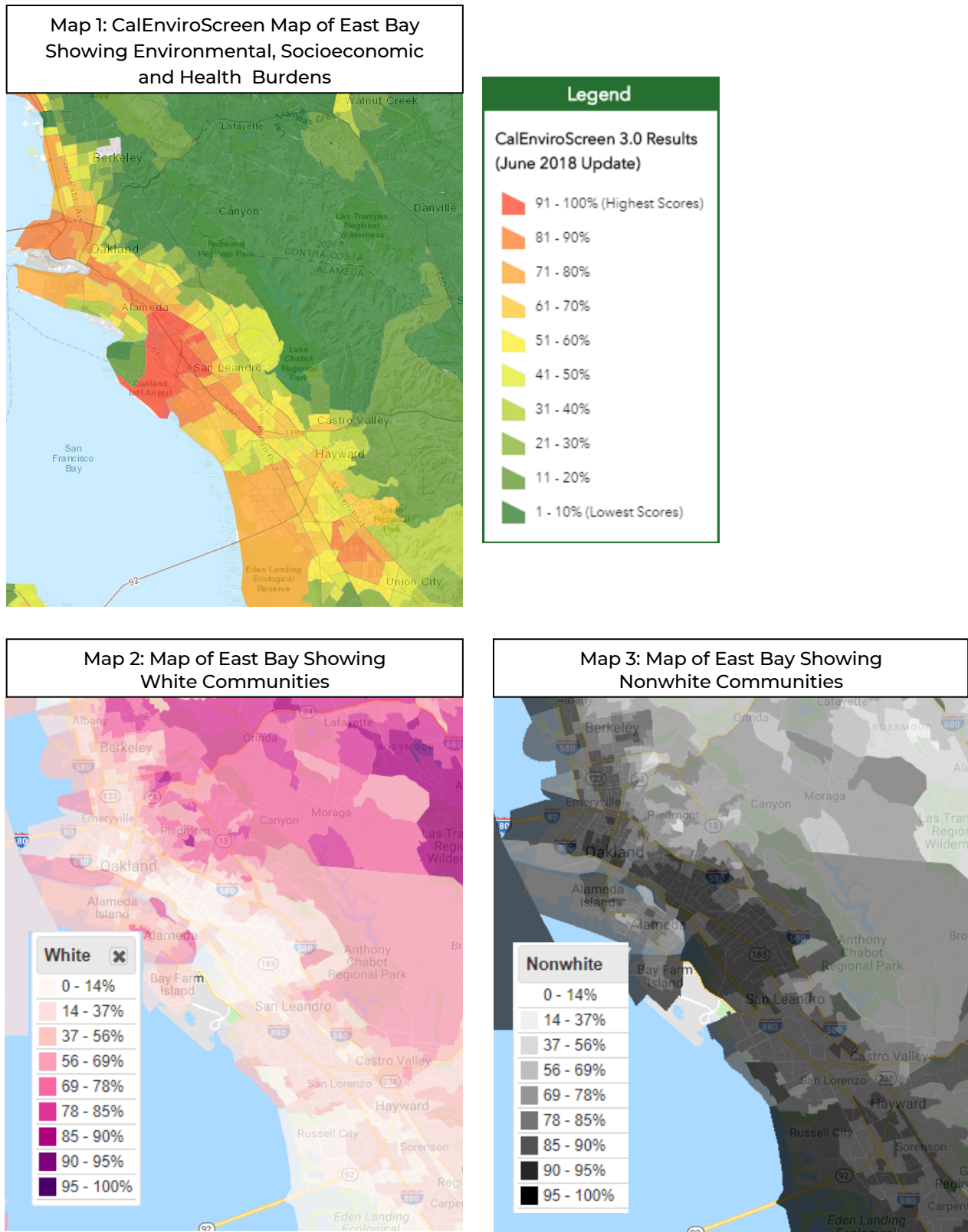
individuals with high barriers to employment such as formerly incarcerated individuals, low-income individuals, homeless individuals, migrant and seasonal workers, and youth who are in or have aged out of the foster care system.^{xv}

The maps below represent environmental and socio-economic burdens and race in California's East Bay:

- **Map 1:** CalEnviroScreen map of the East Bay showing environmental, socioeconomic and health information. Areas in red indicate the most environmentally burdened and vulnerable communities.^{xvi}
- **Map 2:** Map showing White populations in the East Bay in California^{xvii}
- **Map 3:** Map showing Nonwhite populations in the East Bay in California^{xviii}

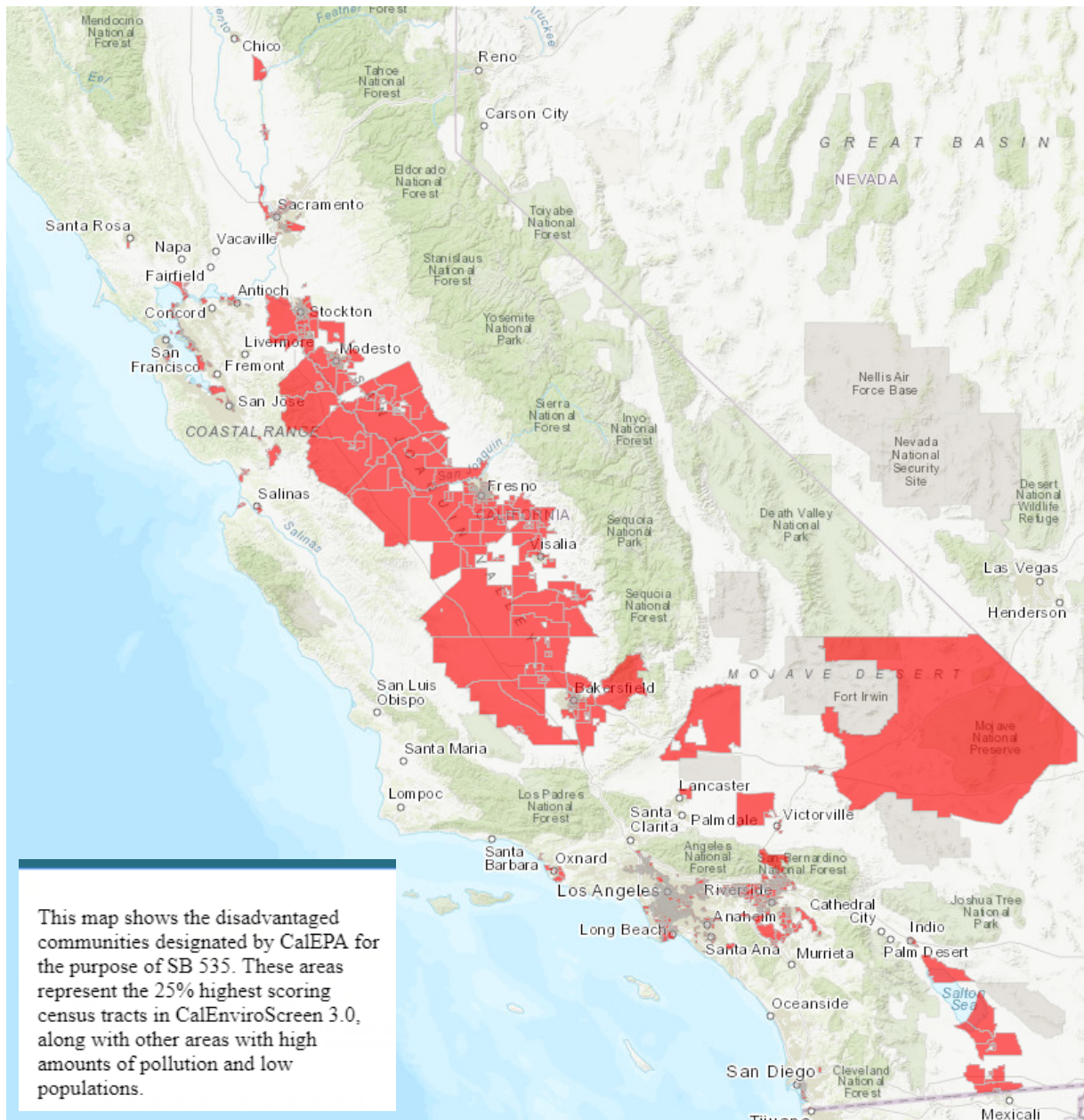
Maps 1-3 show that socioeconomically disadvantaged households that are also located in environmentally burdened areas, generally have a higher percentage of households of color than white households. Many historically redlined communities are the same ones that currently face significant environmental and socioeconomic burdens, indicating the harmful long-term consequences that redlining policies have on low-income communities of color.^{xix} Because of the strong relationship between communities of color, low-income status and exposure to community-level environmental burdens, climate-related grant programs must focus on creating economic opportunities and targeting clean energy benefits in low-income communities of color.

Graphic 2: ^{xx}Maps Showing Environmental and Socioeconomic Burdens and Race in California's East Bay



While the maps above only show East Bay communities, California has many communities overburdened by pollution and socioeconomic inequities, as the following map shows. Areas in red indicate the most environmentally burdened and vulnerable communities. Latinos and African Americans disproportionately reside in highly impacted communities while other groups tend to reside disproportionately in less impacted communities.^{xxi}

Graphic 3: [Map of SB 535 Disadvantaged Communities in California Showing Environmental and Socioeconomic Burdens](#)^{xxii}



Moreover, frontline communities have long been excluded from **policy and funding decision-making processes** that can be used to address the injustices they face and support a

transition to healthy and resilient sustainable communities.^{xxiii} Exclusion from the decision-making table is one reason that the needs of low-income communities of color have not been prioritized.

How can climate-related grant programs address the exclusion of frontline communities from policy and funding decision-making processes? Grant programs can help build power in low-income communities of color by engaging the affected communities in all decision-making processes and by funding projects that address community-identified needs.

In sum, the state must think differently about how it plans for and invests in clean energy to avoid repeating the injustices of the fossil fuel economy that have left low-income communities of color to bear a much greater portion of the burdens and receive far less of the benefits. To implement equity, California climate-related grant programs must explicitly aim to reverse environmental, energy and economic inequities, and ensure communities are deeply engaged in planning and decision-making processes. Doing so will allow all communities to participate in and benefit from the clean energy economy.

THE PUBLIC POLICY CASE

The current policy framework and momentum in California favor a strong social equity strategy for grant programs. Many California policies target funding in the form of grants into communities that suffer from the worst pollution and economic challenges. By directing funds and creating programs that directly benefit the most impacted communities, California can begin to address the harmful consequences of discriminatory and racist practices like redlining that created historical disinvestment and environmental degradation in communities at the frontlines of the environmental justice struggle. One tool California uses to accomplish this is CalEnviroScreen and the “disadvantaged community” designation.

Using CalEnviroScreen to Target Funding into Disadvantaged Communities:

The CalEnviroScreen tool,^{xxiv} which was developed by California Environmental Protection Agency and the California Office of Environmental Health Hazard Assessment, has been used to address pollution and poverty in the most impacted communities, known as disadvantaged communities.

Disadvantaged Communities, or DACs, represent the highest scoring 25 percent of census tracts in the CalEnviroScreen tool. Census tract scores are based on pollution burden indicators (e.g. ozone, PM2.5, pesticide use, traffic, cleanup sites, solid waste sites and facilities) as well as health and socioeconomic indicators (e.g. asthma, cardiovascular disease, poverty, unemployment). Due to Proposition 209,^{xxv} race is not an indicator in CalEnviroScreen. However, as the discussion above about redlining and disinvestment shows, poverty, pollution and race are inextricably linked. In fact, in 2018, the CalEPA released an analysis showing the

connection between race, income and environmental and socioeconomic burdens. The report's analysis shows, "clear disparities with respect to the racial makeup of the communities with the highest pollution burdens and vulnerabilities."^{xxvi} Therefore, by identifying communities burdened by environmental and socioeconomic inequities, CalEnviroScreen has directed benefits to the low-income communities of color that often carry the heaviest burdens.

Using CalEnviroScreen and the DAC designation, California has been able to target investments from the Greenhouse Gas Reduction Fund established by the California Global Warming Solutions Act of 2006 into the most impacted communities. Specific requirements were put into place by two bills, SB 535 and AB 1550. Table 1 below provides a summary of these two landmark laws that set aside a percentage of Greenhouse Gas Reduction Fund dollars to go to DACs and low-income communities. With the success of SB 535 and AB 1550, we're seeing other policies in the state, like AB 523, similarly targeting funds into the most vulnerable communities.

Table 1: California Laws Focusing on Disadvantaged Communities

Year:	2012	2016	2017
Law	SB 535 ^{xxvii}	AB 1550 ^{xxviii}	AB 523 ^{xxix}
Descrip tion:	Requires the California Environmental Protection Agency to identify disadvantaged communities and required that 25% of all funds collected from California's Greenhouse Gas Reduction Fund (California Global Warming Solutions Act of 2006) to be allocated to projects that benefit DACs.	Builds on the success of SB 535 and increases the percentage of funds going to DACs and low-income communities. Requires at least 25% of Greenhouse Gas Reduction Funds go to projects within and benefitting DACs and at least an additional 10% to low-income households or communities (which need not be located within designated DACs).	Requires the California Energy Commission to allocate at least 25% of EPIC funds for technology demonstration and deployment at sites located in and benefiting disadvantaged communities and at least an additional 10% for sites located in and benefiting low-income communities.

Table 1 describes key California laws that advance equity by directing percentages of funds and programs to provide direct benefits to disadvantaged and low-income communities. Since those funds are often delivered in the form of grants, grant programs must be developed with equity at the center in order to effectively carry out the laws' purpose. This framework provides strategies and tools for grant administrators to build equity into all parts of a grant program.

III. How to Create Equitable Goals, Vision and Values

*How is equity described in the context of the overall goal of the project or initiative?
Is equity a core component? Is equity missing?*

WHAT DO WE WANT TO ACHIEVE AND WHY?

The first step in implementing equity in a climate-related grant program is to make equity an explicit core tenet in the goals, vision, and values of the program. Since many grant programs do not currently prioritize equity, it requires a lot of emphasis, definition, and prioritization to become normalized. Furthermore, if equity is not discussed in the program's goals, then program partners and interested applicants may fail to advance equity simply because they were not aware it is a program goal.

Including equity in this early stage will help ensure it is intentionally built into the foundation of the program, rather than trying to force it to fit into a program that has already been designed, which is not an effective strategy. If program designers include social equity priorities in the goals, vision and values, then equity will more likely show up procedurally and in program implementation.

HOW TO ACHIEVE IT:

1. Be explicit about social equity goals and communities the program will benefit

As described in the Justice Case section above, it is important for the work we do now to acknowledge and address past injustices that marginalized communities have faced. Grant programs can begin to do this by having the program's goals, vision and values explicitly state the equity goals it intends to achieve and specify the communities it intends to benefit. This will help ensure program stakeholders and applicants clearly understand the program's equity goals.

It helps to specify the target community because in conversations about social equity, terms such as *underserved*, *low-income*, *disadvantaged*, or *environmental justice community* are often interchanged but can potentially have different meanings depending on the context.^{xxx} There are also different statutory definitions and references from various funding sources, making it even more necessary to clarify terminology and define terms where possible. For instance, the vision statement for the [Transformative Climate Communities program](#) states that it aims to fund development and infrastructure projects that achieve major environmental, health, and economic benefits in California's most *disadvantaged communities*, and it also provides a definition for the term "disadvantaged community."^{xxxi} This language provides clear direction to applicants about which communities the program aims to benefit.

2. Include the following social equity priorities in the goals, vision and values

Including the following equity priorities as part of the program's goals, vision and values will help ensure that the program is designed to achieve those priorities.

Table 2: Examples of Social Equity Priorities to Include in Goals, Vision and Values

ENVIRONMENTAL AND ENERGY EQUITY PRIORITIES	ECONOMIC EQUITY PRIORITIES	COMMUNITY INCLUSION AND GOVERNANCE PRIORITIES
<ul style="list-style-type: none"> Targeted pollution reduction in heavily polluted communities Solutions that are useful, accessible and beneficial to under-resourced communities. No increase in harm in terms of pollution, health and affordability of goods and services Anti-displacement strategies Improved health outcomes 	<ul style="list-style-type: none"> Workforce development (expansion of job training programs with career pathways), particularly for underrepresented groups and individuals with barriers to employment Promote engagement and contracting with diverse-owned businesses Accessible and quality jobs with livable wages and benefits Promote workforce diversity 	<ul style="list-style-type: none"> Solutions that respond to community-identified needs Meaningful community partnerships and engagement in planning and decision-making Advance community power and promote community ownership of project or program Technical assistance and capacity-building resources

An example of a climate-related grant program that includes many of the above priorities is the [2018 Social Equity Tree Planting Grant Program](#),^{xxxii} which is administered by California ReLEAF and funded by a grant from the California Department of Forestry and Fire Protection:

Table 3: Social Equity Priorities in California ReLEAF's Social Equity Tree Planting Grant Program

ENVIRONMENTAL AND ENERGY EQUITY PRIORITIES	ECONOMIC EQUITY PRIORITIES	COMMUNITY INCLUSION AND GOVERNANCE PRIORITIES
<ul style="list-style-type: none"> Provide GHG reduction benefits to underserved areas 75% of funds in 2018 grant cycle awarded to proposals in which majority of project is located within a Disadvantaged Community 	<ul style="list-style-type: none"> Grantee must provide multiple co-benefits including workforce development for communities being served 	<ul style="list-style-type: none"> Nonprofits and community-based organizations eligible for funding Project demonstrates nexus between important community needs and benefits project will provide Commitment for active participation from community members and volunteers in neighborhood where work is being completed. Community members must be involved in both planning and implementation of projects

The following recommendations address how to take the key equity priorities listed in Table 4 and include them in a program's goals, vision and values:

3. Build content

- Include the program's commitment to equity on the program website and marketing materials so that viewers immediately recognize it is an integral part of the program. Make sure this information is easily visible on any online materials and is not buried

away in some hard-to-reach corner of a website. For example, one of the goals for the [CalSEED program](#) is to fund innovations that advance social equity. The images below compare two versions of the CalSEED mission statement. Looking at the older version on the left, the program's commitment to social equity is not immediately apparent because there is no equity-focused language. This makes it difficult for viewers, especially interested applicants, to know social equity is an important priority of the program, and as a result, the program itself may not receive applications that meaningfully advance equity. The image on the right shows the mission statement's current language,^{xxxiii} which now includes language around diversity and achieving equitable outcomes. Similarly, the [vision for the Transformative Climate Communities Program](#)^{xxxiv} clearly explains that the program aims to bring environmental, health, and economic benefits in California's most disadvantaged communities through community-led projects. The website for [Kapor Capital](#) also does a good job of socializing equity in its mission statement.^{xxxv}



- b) Create an “Equity Priorities Framework” for the program that explains in detail how the program's goals, vision and values advance equity. The framework should include the key equity components listed in Table 4. Greenlining developed an Equity Priorities Framework for the CalSEED Initiative that discusses the program's social equity goals and the guiding equity principles that the program should uphold.

4. Socialize the program's social equity-centered goals, vision and values

- a) Program administrators should socialize the content with all program partners and subcontractors so that everyone is on the same page and understands the program's social equity goals. For example, when Greenlining met with CalSEED partners to share the Equity Priorities Framework, we learned that some partners thought we were discussing business equity, not social equity. We suggest setting up a meeting where all program participants can discuss the program's social equity goals, vision

and values, and offer feedback. Socializing the equity priorities should be an ongoing effort to ensure they remain an important part of the program.^{xxxvi}

5. Revisit the program's social equity-centered goals, vision and values

- a) As the program evolves, the social equity priorities may also change. The program administrator should revisit the priorities to evaluate whether they are still applicable and relevant to the program, and to update them as necessary.

IV. How to Create an Equitable Program Process

*How does the project or initiative propose to deliver outcomes with equity as a focus?
How are decisions made or influenced by communities with less political power or voice?*

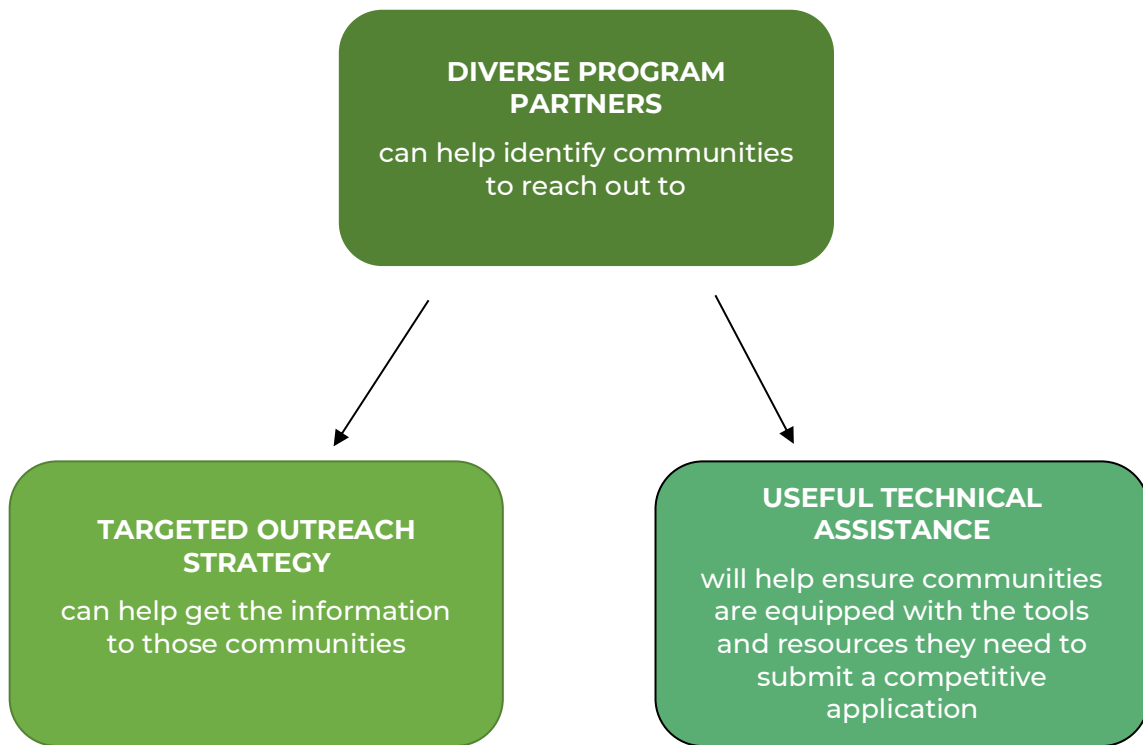
WHAT DO WE WANT TO ACHIEVE AND WHY?

To create a diverse and inclusive clean energy economy, California must ensure that diverse and underrepresented communities—including disadvantaged, low-income, tribal and rural communities—across the state have the resources they need to competitively apply for grants. The solicitation cycle must therefore be developed in a way that ensures *everyone* has a fair opportunity to apply and become an integral part of the transition to an emerging green economy.

This means going above and beyond to make sure the grant information reaches communities with barriers to access, such as linguistically isolated communities or communities without grant writing experience. An equitable process will help ensure that the program information reaches target communities, that there is strong diversity in the application pool, and that the grant materials are accessible to all communities.

This section identifies strategies to advance equity in the following process components of a grant program:

1. Leveraging diverse community partners and/or subcontractors
2. Effective and inclusive outreach
3. Offering technical assistance to achieve equitable outcomes
4. Application development



Importantly, these activities must be appropriately resourced to ensure they are done well, and that the implementing agency has staff capacity to work on them. Lack of funding and staff capacity often result in only the bare minimum being done for community engagement, outreach and technical assistance.

HOW TO ACHIEVE IT?

1. Leveraging Diverse Community Partners and Subcontractors

Partnering with members of the community that the program is targeting, as well as organizations that focus on social equity, diversity and inclusion, can help advance social equity. This will help ensure impacted communities can influence decisions and that the program advances community-driven solutions.

Social Equity Partners Advance Community-Driven Decision Making

If a grant opportunity is designed to bring benefits to a target community, members from that community must be meaningfully involved in the development of the solicitation cycle. The target community should have the ability to influence decisions in a way that addresses their specific needs and concerns. The [BlueLA car-sharing program](#)^{xxxvii} that aims to reduce air pollution, improve mobility, and lower transportation costs specifically in low-income areas has done this by working with a committee of community-based organizations that know their

community's mobility needs. This committee helps ensure the program funds projects that will actually address those needs.

Importantly, community partners must be compensated financially for their time and effort in this process. This is especially important when partnering with community-based and grassroots organizations, many of which are already low-staffed and under-resourced.

Grant administrators should collaborate and consult with community members and community-based organizations located in the project site as early as possible and involve them in all aspects of the program. They can provide feedback about the program's overall approach to social equity as well as specific guidance on, for example, how to conduct targeted outreach to reach community members and how to make the application accessible to their specific community. Community-based organizations and nonprofits can share program information with their networks and ties to communities. They can also serve as connectors between the communities and other program partners such as cities and agencies.

For example, Greenlining offers strategies for the CalSEED Initiative on how to strengthen equity in the program. For example, we convene an equity committee that consists of 10-12 partners from diverse backgrounds and expertise in a variety of fields, including community organizing, workforce development, research, public policy, investing, and small business. The equity committee assists with outreach and application review and provides feedback on CalSEED's equity priorities. Having such diverse perspectives in our program resulted in very creative outreach strategies and ideas to improve the program, which Greenlining could not have developed without their support.

The social equity partners can also serve as a resource to applicants and program awardees. The partners can help answer their questions on social equity issues and provide ongoing support and mentorship to strengthen the awardees' efforts to advance equity. Based on the questions asked and resources needed, the program can then gauge how applicants are thinking about social equity and pay special attention to any topics that require further clarification. For example, Greenlining offers CalSEED awardees trainings on social equity, diversity and inclusion, and we also provide one-on-one guidance to awardees to help them achieve their specific equity goals. These topics are discussed in the Program section of this guide.

All Partners Must Advance Equity Goals

For the process to be truly equitable, *all* program partners must understand and uphold the program's equity-centered goals, vision and values—not only partners with social equity expertise. Therefore, all partners (including any city or agency members) should receive a social equity training that (1) explains why equity is a program priority and (2) offers suggestions on how each partner can advance equity in their individual program responsibilities.

2. Effective and Inclusive Outreach

Programs advertising grant opportunities commonly do inadequate outreach, particularly in disadvantaged and low-income communities. Traditional outreach methods (e.g. email blasts) are insufficient and often exclude individuals lacking reliable and affordable internet access or those who receive information through non-online sources. A targeted outreach strategy is necessary to bring the program information to historically marginalized communities, populations and individuals. This will help ensure the program has a diverse applicant pool that reflects the rich diversity of California.

Effective and inclusive outreach strategies should include the following:

Dedicated Staff to Lead Equity Outreach

A lack of staff capacity is often a barrier to meaningful and effective outreach efforts since outreach activities require significant amounts of time, planning, education, coordination and networking. Therefore, programs should include staff specifically dedicated to work on developing and implementing equitable outreach strategies, with that as their primary responsibility.

Outreach Media

Successful outreach strategies meet people where they are. Digital outreach has a role but should not be the only outreach tool since people who are unfamiliar with grant programs may not know where to find information or join listservs.

In-person events can be a useful outreach strategy, but they must be developed with the target community's needs in mind. Many low-income residents cannot participate in networking events or workshops in the daytime because of job responsibilities. These events should be after working hours, close to public transit, and offer food and childcare services.

The following chart includes online, in person and other outreach mediums to maximize reaching target communities.

Table 4: Outreach Media

ONLINE	IN PERSON	OTHER
Recorded webinars. They provide flexibility for people to access information at their convenience.	Meet with CBOs and Nonprofits. Research CBOs and nonprofits that have program-aligned interests and that focus on diversity, inclusion and equity. They may be able to share information through their own networks and reach local communities.	Media Outlets. Different ethnic groups use the radio, newspapers and/or magazines to get their news and information. Research ethnic media outlets, and especially non-English outlets, to share program information for specific ethnic groups
Listserv Email Blasts. The emails should provide links to program information and technical assistance resources.	Workshops in Community Spaces. Take the information to popular community meeting spaces such as schools, churches and community centers.	Leaflet Distribution. Bring leaflets with program descriptions and contact information to relevant locations to your grant program such as colleges, vocational schools, community events, town hall meetings etc.

Newsletters. Ask entities with aligned interests (e.g. community-based organizations, universities, and community colleges) and prospective applicants if they can share information newsletters.	Conferences and Networking Events. Attend community and professional networking events or conferences hosted by organizations that focus on diversity, inclusion and equity to share information. Some organizations host monthly mixers to meet people working in the same field and share information.	Door to door canvassing
Grant Databases. Including Funding Wizard ; Uplift CA ; EPIC Funding Opportunities and CEC Funding Opportunities .	Community Colleges and Universities. Reach out to professors, student groups, and departments with program-aligned interests to share or present information.	
Web-based networking opportunities. For example, programs can create a LinkedIn Group where members can network and form project teams for grant opportunities.	Job Fairs. Share information at job fairs, especially ones focusing on social justice issues.	
Blogs, Op-ed and other online publications (e.g. via CalMatters or local sites like https://timesofsandiego.com/ and https://missionlocal.org/ . These publications should share program information in accessible language.		
Social media. Create program pages on Facebook, Twitter and LinkedIn and post information. Use social media to reach out to equity-focused groups that may be interested.		
Podcasts. Share information on podcasts focusing on topics related to the program.		

All outreach media should include information on how to stay connected and receive program updates (like a link to an “intent to apply” form or information on how to join a mailing list) so that people can easily stay informed.

Outreach Partners

Programs can improve outreach by partnering with entities that have networks that reach historically underrepresented groups. The outreach partners should be financially compensated for their time and work. Outreach partners may include the following:

- Local community-based organizations and nonprofits
- Ethnic chambers of commerce and business groups.
- Economic development agencies

- Universities, community colleges and vocational/trade schools
- Philanthropy groups
- Trade organizations with program-aligned interests
- Associations, firms and organizations focusing on people of color (e.g. National Society of Black Engineers; Black Girls Code)
- Unions (e.g. International Brotherhood of Electrical Workers)
- Co-working spaces
- Faith-based organizations
- Social Media Influencers with program-aligned interests

In addition, to achieve **geographic diversity** in an applicant pool and ensure program information gets promoted to all California regions, we recommend forming “social equity regional partnerships” with community-based organizations and other organizations located in different California regions. The partners can share resources, assist with hosting events, and ensure social equity is emphasized at outreach events. The partners should be funded and resourced to conduct outreach throughout their networks.

Outreach Content

Outreach materials such as emails and flyers must be clear and accessible to the people in the area or region where you wish to conduct outreach. Research and collaboration with community organizations may help uncover best outreach practices of a certain area or region. Consider the following tips when designing outreach materials:

- **Translate** targeted outreach materials and educational information into key languages of the area or region.
- Ask equity partners to review **messaging** to ensure the content is accessible, inclusive and clear. Avoid using technical language in outreach material.
- Include **clear next steps** so people know what to do next. Include contact information if people have questions or a link to a website or social media page where people get more information.

3. Offering Technical Assistance to Achieve Equitable Outcomes

Even if the outreach strategy successfully reaches target communities, they still may not apply if they lack the technical expertise or resources to complete the application. Technical assistance can help ensure the application process is as accessible as possible to historically underrepresented groups including women, people of color, low-income communities, tribal communities and rural communities. Technical assistance can serve as a powerful tool to help first-time applicants navigate the application process and eliminate barriers such as language

that may prevent parties from applying. We identified the following technical assistance strategies:

1. **Ask Applicants about Technical Assistance Needs**—The program should ask the applicants directly about their technical assistance needs to gauge whether the resources offered by the program will meet the applicants' needs:
 - **TA to Complete Application**: The program can offer a **pre-application survey** to ask interested applicants: *What type of assistance will you need to complete your application?* The survey question should include common technical assistance needs (e.g. assistance with developing a budget, how to scope a project, how to create a business plan) since some applicants may not be aware of what resources they need, as well as an “other” category to capture additional needs.
 - **TA to Complete Project**: The **application** can include the following question: *“If you receive the grant, what type of technical assistance will you need to complete your project?”* This will provide the program administrator with an idea of the types of trainings, mentoring and resources awardees require. It is important to recognize that a large business may have different support needs than a small nonprofit. Applicants should have technical assistance that meets their specific needs.
2. **Post-Application Meeting**—The meeting should bring together applicants who did not receive a grant award and provide them with information about what they can do next time to have a stronger application. The meeting should also ask applicants what TA needs they had that the program did not offer but should offer moving forward.
3. **Multiple Languages**—To assist applicants whose first language is not English, the program website and application materials should be available in at least two languages that accurately represent the most commonly spoken languages of the grant program's region.
4. **Webinars**—A webinar that explains different parts of the application should be developed and posted on the program website and made available to applicants. It can include topics such as an overview of the program, tips on how to advance social equity in your project, how to budget a project, and how to scope a project. For the CalSEED program, Greenlining and CalCEF created a webinar and invited the application reviewers to offer best practices and advice on how to submit a strong application. Recognizing that many applicants wanted additional guidance on the “Social Impact” section of the application, Greenlining developed a webinar entitled “[Social Impact” in the CalSEED Application” webinar](#)^{xxxviii} that included social equity basics and provide potential applicants an opportunity to ask questions.
5. **Sample Application**—Posting a sample or model application on the program website can function as a point of reference for applicants who are unfamiliar with the process.

6. **Application Manual**—The program should provide a comprehensive, easy to use application manual that includes detailed information about the program, application and scoring process, FAQs and other relevant information that applicants can easily find in one document. See [CalSEED's Application Manual](#)^{xxxix} used for its Spring 2018 solicitation.
7. **Detailed Definitions Section**—A definitions section that elaborates on technical terms will give applicants a better understanding of terms used in the application (e.g. “disadvantaged community,” “CalEnviroScreen” and “accessible”). An application manual, a grant guidelines document or the application itself can all serve as the appropriate document to include definitions.
8. **Contact Person to Answer Questions**—The program website should provide direct and easy access to program officials and administrators who can answer applicants’ questions via a phone number, email or an online form where people can submit their questions.
9. **Option to Apply by Mail**—The program should offer the option to submit applications by mail to ensure applicants without convenient access to internet are able to apply.
10. **Additional Grant Opportunities**—The program should offer information about other funding opportunities in the event an applicant does not receive a grant. We want to encourage applicants, especially first-time applicants, to become well-informed and to continue applying for funding opportunities. We also want applicants to develop business and networking skills.
11. **Feedback Form/Survey**—A feedback form or survey should be available to applicants to fill out after they complete the application. Feedback will provide valuable information from applicants about their experience completing the application, as well as insight into what applicants thought was helpful or could be improved.
12. **Technical Assistance Section on Website**—The program website should include a Technical Resources page where applicants can access the support tools listed above such as webinars, application manual, sample application, outreach events, additional funding opportunities, and contact information.

4. Application Development

Application Questions

Designing the application questions with social equity in mind is key to ensuring that projects funded produce meaningful and direct benefits for communities. Questions should ask applicants how their project will advance social equity by focusing on the key equity priorities we discussed in the Goals, Vision and Values section. Here are sample questions that ask about the social equity priorities:

Table 5: Sample Application Questions

ENVIRONMENTAL AND ENERGY EQUITY PRIORITIES	ECONOMIC EQUITY PRIORITIES	COMMUNITY INCLUSION AND GOVERNANCE PRIORITIES
<p>1. What are the potential adverse impacts of your project in disadvantaged communities, in terms of pollution, health impacts, and affordability of goods and services? Are there any other unintended adverse consequences that could result from your project?</p> <p>2. Is your project being developed in an open space for community access and use? If not, how will you enable access for low-income communities?</p> <p>3. Does your project address a high-demand issue that needs to be addressed in underserved communities, and if so, how? Example of high-demand issues include: (1) reducing major sources of pollution, such as emissions from medium- and heavy-duty transportation and fossil fuel power plants, which would have significant health benefits for disadvantaged communities (2) providing access to clean energy technology in multi-family dwellings (3) addressing barriers identified in the CEC's 350 Barriers Study.^{xi}</p>	<p>1. How will your project impact employment opportunities? (What types of jobs will it create and in what sectors? How many people will you be employing on this project as a result of the model you're creating? How many people will be required to carry out the project at full scale? What will the job requirements look like?)</p> <p>2. How will your project scale in low-income and/or disadvantaged communities?</p> <p>3. What types of economic and health benefits will your project create for low income and disadvantaged communities, and how? Provide examples of: (1) job opportunities/creation (indicate whether jobs are temporary or career track/long-term), particularly for low-income and disadvantaged communities, underrepresented groups, and workers with barriers to entry, (2) contracts with small and diverse-owned businesses (3) targeted access to technology, (4) improving air quality, (5) lower energy costs (6) anti-displacement strategies,</p> <p><i>If businesses can apply to the program, consider including the following questions:</i></p> <p>1. Are you a registered small business owner? Diverse-owned business? Women-owned business?</p> <p>2. Does your business plan intend to include a social investment commitment?</p>	<p>1. Are you a first-time applicant?</p> <p>2. Who is the intended end beneficiary of the project?</p> <p>3. What type of technical assistance will you need to complete the application?</p> <p>4. If you receive a grant, what type of technical assistance will you need to complete your project?</p> <p>5. Who are your strategic partners in the social justice field?</p> <p>6. How do you plan to collaborate with community groups in disadvantaged and low-income communities?</p> <p>7. Ask applicants to provide letters of support and commitment. Letters from community-based organizations, site hosts and other social equity partners that demonstrate project equity and project feasibility are most helpful.</p> <p>8. How will the impacted community have ownership over the project?</p>

Scoring Criteria

- Advancing social equity priorities should be required for a project to get funding. If they are optional, then applicants may provide weak answers to the social equity questions or simply not include equity in their project proposal.
- Projects that include community-based organizations as partners should receive additional credit or points since the project is working to involve the community in planning and decision-making.
- The application should also expand the scope of work eligible for funding so that a more diverse group of applicants can qualify for funding. We want to ensure that entities other than corporations or large research institutions with significant resources (for example,

NGOs, schools and small businesses) will be eligible for the grant award even if their project requires a smaller funding amount.

Reviewing Committee

The reviewing committee that scores applications should include members with social equity expertise as well as community members who can provide perspectives on how relevant a project may be for a community located in a specific area or region.

V. How to Center Social Equity in Program Implementation

How does implementation lead to equity outcomes? What explicit equity outcomes are described in the project/program/service?

WHAT DO WE WANT TO ACHIEVE AND WHY?

“Our ‘why’ is simple: justice. Communities of color have been, and continue to be, redlined out of economic opportunity”

- Danielle Beavers [Diversity Equity and Inclusion Framework](#)^{xli}

As we discussed in the “Why Social Equity Matters” section, the racial wealth gap remains one of the biggest economic inequities created by this country’s structurally racist past and present. The racial wealth gap has left low-income communities of color with some of the most polluted air and water, plus a lack of climate investments that could create healthier communities, quality job opportunities, and innovative programs that reduce the cost of basic necessities.

Many policies that have been recommended to close the wealth gap focus on asset building tools aimed at Black Americans, and while they are extremely important, another opportunity to close the racial wealth gap lies in entrepreneurship. Public, private and nonprofit sectors across America can all play a role in providing communities of color with targeted entrepreneurship opportunities. Actions like supporting minority-owned businesses, centering a company’s culture around diversity, equity and inclusion, or supporting grants that expand access to capital, including seed funding, for people of color can promote entrepreneurship to help reduce the racial wealth gap and bring economic opportunities and investments into communities of color.

A grant program can work to reduce the racial wealth gap by developing an implementation strategy that aims to advance the health and wealth of underserved communities. For example, as a CalSEED partner, Greenlining seeks to diversify the economic and clean energy sector by providing grant awardees with resources necessary to cultivate business practices that prioritize social equity, to understand community needs, to target clean energy benefits to communities that need them the most, and to create social equity champions.

This section will offer recommendations on social equity trainings and tools that grant program administrators and partners can provide to grant awardees as they implement their project.

HOW TO ACHIEVE IT?

A. Recommended Trainings and Tools for Award Recipients

This section covers recommended social equity tools and trainings that climate-related grant programs can offer their award recipients.^{xlii}

Recommendation #1: Training on “Why Social Equity?”

Grant programs should provide applicants and awardees with an understanding of why social equity is important (please refer to the “Introduction” and “Why Social Equity” sections of this framework) and explain the desired social equity outcomes of the program. Once the “why” is understood, the program can then offer more in-depth trainings that explain *how* to incorporate social equity in all stages of project implementation.

Recommendation #2: Implementation that Begins with Community-Identified Needs

Often when award recipients are developing their project, they solicit feedback from their close networks but not from communities whom the project is designed to benefit. To bring targeted benefits to low-income communities of color, it is paramount to include community involvement. Speaking with community members that belong to community-based organizations can help awardees to learn how their innovation can be tailored to solve a social issue that low-income communities of color face. Local community-based organizations can identify the strengths and needs of the communities they serve.

Partnership with these organizations can ensure that awardees engage the community and take community concerns into account as they develop their project. However, identifying and understanding community needs may be difficult for people who do not know where to begin, or who have never thought of involving community interests in a project or product. The following steps offer guidance on the community engagement process:

Step 1: Identify Community Needs through Research

Grant awardees must first understand the particular issues a community faces, such as air pollution from a freeway or loading dock, water contamination, high levels of asthma or even levels of unemployment. This research can be done online by looking at research papers, articles and websites of community-based organizations that advocate for specific issues in their community. CalEnviroScreen can also provide data at the census-tract level about different pollution burdens affecting communities.

Step 2: Inform, Consult and Collaborate with Community

Once an awardee has a general idea of issues that a community is facing, they must then meaningfully engage with the community to understand those needs as experienced by community members themselves. Since independent research generally does not provide

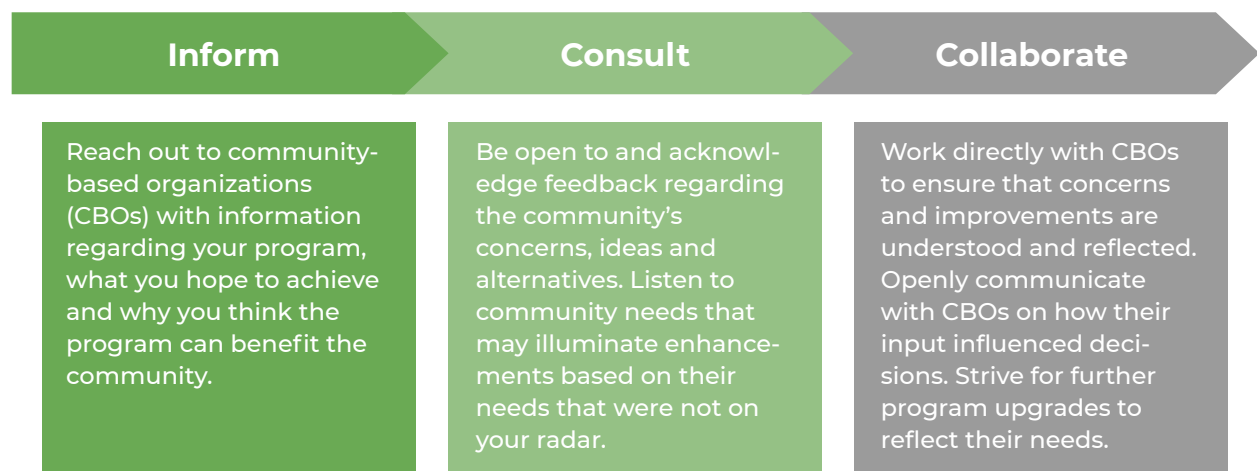
first-hand accounts, the intricacies and real-world impacts of specific problems cannot be completely understood through independent research alone. As a result, a project or product designed to solve one issue may actually end up not being useful to the intended end user. For example, while the design and sale of affordable rooftop solar panels is important, if the intended end user is a low-income renter, affordability alone won't help: Renters still will not be able to access the technology since they don't own their home and cannot modify their landlord's building. Low-income renters face many barriers when it comes to adopting solar technology, but those multiple barriers may not come to light without speaking with the community. Community engagement enables an awardee to learn and understand whether a project is useful and relevant for a particular community and may lead to suggestions and improvements that make the project more helpful.

Attending community meetings that community-based organizations host can provide excellent opportunities to work with communities. The awardee will have an opportunity to learn about community issues and network with community members who might be willing to give feedback on their project or product. There are of course many other ways that an awardee can engage with a community, such as attending community meetings hosted by the city or district representatives, conferences, community street fairs, community boards, setting up a table at a community event, or browsing city websites for community-centered events and gatherings.

The community involvement process can be simplified into three easy steps seen in the chart below. This information can be useful for awardees looking to pilot a project in a specific low-income community of color or for those looking to network with community members and community-based organization to obtain project and product feedback.

The community involvement process ensures that, as an awardee begins implementation of their project or product, it reflects the needs, perspectives and input of the community involved.

Graphic 4: Community Involvement Process



Recommendation #3: Addressing Unintended Consequences with Social Impact Assessments

During project design, awardees should analyze the potential unintended consequences of the project. In a world that places high value on monetary impacts (negative or positive), it is important to analyze non-monetary benefits and burdens and address them before projects are implemented to ensure that projects employ least-harm solutions. Non-monetary societal impacts that can be affected by a project can include the following variables: demographic, socio-economic, political, needs, values and aspirations.^{xliii} At The Greenlining Institute, we use social impact assessments to focus our advocacy and work on understanding policies and projects that can both provide the most *benefits* and create the least *harm* to low-income communities of color.

Many in the international development and public planning sectors use social impact assessments, and this tool can be easily adapted to individual projects at a smaller scale. Social impact assessments promote social equity, diversity and community empowerment.^{xliiv} They are valuable to not only identify the positive and negative societal impacts of a project, but to also make sure that those impacts are monitored and addressed. Below you will find resources on social impact assessments, and a summarized outline of the steps to take when conducting a social impact assessment.

Social Impact Assessment Resources:

- [Social Impact Assessment](#)—International Union for Conservation of Nature^{xlv}
- [Social Impact Assessment](#)—International Association for Impact Assessment^{xlvi}
- [Making a Case for Social Impact Assessment in Urban Development](#) -- Procedia: Social and Behavioral Sciences^{xlvii}
- [What is Social Impact Assessment?](#)—Wilson, E.^{xlviii}
- [Process for Undertaking Equity Assessment](#)—Australian Transport Assessment and Planning^{xlix}

Social Impact Assessment Outline:^l

1. Scope the community you plan to work in
 - a) Collect data (quantitative and qualitative) on community demographics, socioeconomic variables, and needs and aspirations.
 - b) Incorporate public participation and output by engaging with community stakeholders.
2. Assess the social benefits and unintended social burdens a project might have on a community given the research conducted in Step 1.

3. Address the unintended social burdens by outlining an appropriate mitigation strategy.
4. Continue to engage with the community to make sure unintended consequences of a project are mitigated and project benefits are maximized.

Recommendation #4: Mentorship and Coaching

Program administrators should work with social equity partners to provide awardees with coaching and mentoring as they implement their project. Coaches and mentors can help awardees find ways to maximize their project's social impact. While coaching and mentorship can sometimes be used interchangeably, the difference that sets the two apart is the end goal.ⁱⁱ Mentorship should be conducted by a previous award recipient or someone with relevant expertise who can offer general guidance on how to incorporate social equity in a project or program, while the coaching should be conducted by program staff to strengthen the awardees' understanding of social equity.

Table 6: Mentorship and Coaching to Support Grant Program Awardees

Activity	Mentorship	Coaching
Facilitator	Previous award recipient, or if it is a new grant program, someone with expertise in the issue area	Grant program staff or grant partner (with a strong understanding of social equity)
Goal	Provides the recipient with general guidance for long-term development	Provides the recipient with tools and techniques to improve their understanding and incorporation of social equity
Process	<p>A previous award recipient who successfully integrated social equity into their project and is able to share firsthand experiences, challenges and breakthroughs, should be paired with a newly awarded grant recipient with the understanding that they will provide mentorship of the grant process and guidance in incorporating and achieving social equity. Alternatively, if the grant program is new, the mentor can be someone who has worked on similar projects or is an expert in the issue area</p> <p>This mentorship process allows for the new awardees to hear from those that were once in their shoes and who can give valuable feedback, program insight and support</p>	<p>A grant program staff or grant partner with a strong understanding of social equity should be accessible to grant awardees for one on one conversations that provide tools and techniques to incorporate social equity into the awardee's project or program</p> <p>The coaching can focus on how to target benefits into communities, providing deeper levels of understanding of social equity, providing networking opportunities relevant to their project, and other subjects as appropriate</p>

Recommendation #5: Communicating Social Equity Wins

Finally, communication is an invaluable tool to share the program's social equity wins, and to show that it is possible to achieve equity outcomes. Some tools to communicate your grant program's social equity wins include:

- Have pictures of awardees on the grant program website or on other marketing tools.
- Share success stories about projects with strong social equity elements through blog posts, on the program website, and via social media outlets.

- Interview awardees who embed social equity in their project and share their experience, challenges and advice they can offer to potential applicants. For example, Greenlining published a [blog post](#) that included an interview of one of the few nonprofit awardees in the CalSEED cohort. The awardee shared lessons learned from the experience, and the interview also provided encouragement for more nonprofits to apply for a grant.^{lii}
- Contact local news media and encourage them to cover the program's successes.

B. Strategies to Incorporate Social Equity in the Business and Supply Chain

The recommended trainings above focus on implementation strategies to help grant awardees bring social equity benefits out to communities. If businesses and entrepreneurs are eligible applicants for a grant program, this also presents an opportunity to embed equity within the company itself.

For example, the CalSEED program provides early-stage funding to support entrepreneurs with clean energy ideas. As the entrepreneurs work on their innovation, many of them are also in the early stages of developing their company. They may be thinking about growing their staff or deciding which manufacturers to work with. We see this as an opportunity to advance economic equity. Entrepreneurs and businesses can create economic growth by placing their businesses in and hiring people from underinvested communities, hiring diverse employees and creating an inclusive culture in the workplace.

This section will discuss how social equity can create business advantages for businesses and entrepreneurs while addressing pressing societal inequities through (1) workforce diversity and inclusion, (2) supplier diversity and (3) development of a business model that focuses on *both* the revenue model and the social equity model (or shared value^{liii}).

1. Achieving Workforce Diversity and Inclusion

In today's age, diversity in the business is defined as having staff members that represent the community at large. Inclusion refers to how an entity shapes its culture to make sure that all members feel included. Diversity and inclusion have evolved from the 1960's to focus on not just race, but also gender, sexual orientation, veteran status and more.^{liv}

A 2017 PolicyLink Report, [The Competitive Advantage of Racial Equity](#),^{lv} found that many companies experienced increased profits and growth when the company culture and structures focused on diversity, inclusion, and growth models that benefit society. A diverse workplace can be a source of competitive advantage for companies:

1. Diversity Leads to Innovation that Expands the Consumer Base
 - a) A diverse team can innovate products and services to meet the needs of a more diverse audience, creating a larger consumer base. Nike was able to create an innovative campaign strategy back in 2013 when it launched the "[Corre por tu barrio](#)" ("Run for your neighborhood") campaign in which the company was able to

grow its consumer base and brand loyalty by mobilizing Mexico City communities to participate in athletic competitions.^{lvi}

2. Diversity Opens Networks

- a) A diverse staff and leadership team can bring new networks that can be used to expand relationships and widen the target audience.

3. Diversity Enhances Problem-Solving

- a) Research has shown that the more diverse a team is, the easier it is for them to solve problems, achieve higher revenues, attract more customers, and have greater market shares.^{lvii}

While many reports exist that talk about and describe best practices for achieving workforce diversity and inclusion (see list below), the best place to start is with commitment from leadership that focuses on the understanding of diversity and inclusion not just as a metric. Commitment from leadership means that the hiring process, company culture and employee experience will be prioritized to successfully achieve a diverse and inclusive workplace. Below you will find a list of diversity and inclusion resources, and a list of best practices for achieving diversity and inclusion:

Diversity and Inclusion Resources:

- [*The Competitive Advantage of Racial Equity*](#)—PolicyLink^{lviii}
- [*Making Green Work*](#)—Ella Baker Center^{lix}
- [*Diversity and inclusion: 8 Best Practices for Changing your Culture*](#)—CIO^{lx}
- [*7 Practical Ways to Reduce Bias in Your Hiring Process*](#)—Harvard Business Review^{lxi}

Diversity and Inclusion Best Practices:

- Plan to achieve a diverse and inclusive workplace by making sure that all staff, from leadership to part-time staff, understand the company's diversity and inclusion commitment and goals as well as attend trainings.
- Focus recruitment on nontraditional advertisements that attract a diverse pool of applicants, such as radio ads, newspaper ads, social media and online classifieds, ethnic media and non-English media outlets.
- Remove forms of unconscious bias^{lxii} from hiring processes.^{lxiii}
- Implement targeted hiring practices aimed at providing employment opportunities for people with high barriers to employment.^{lxiv}
- Implement local hiring practices when a business is located in a low-income community

- Support salary transparency to achieve pay equity^{lxv} (the elimination of wage disparities based on characteristics such as race or sex)
- Job Tracking and Reporting: Workforce data should be collected and tracked at the individual level: length of employment, hours worked, positions hired for, advancement, barrier to employment characteristics, income level, race, zip code or census tract

2. Achieving Supplier Diversity

Supplier diversity is the practice of purchasing goods and services from businesses that have Minority Business Enterprises (MBE) and Women-Owned Business certifications.^{lxvi} Supplier diversity seeks to create economic opportunities, including jobs in local economies, while building the wealth of entrepreneurs of color and other underrepresented entrepreneurs. All communities should have equal access to business opportunities, and supplier diversity is a tool to make that happen. Big companies from Coca-Cola to public agencies like the California Energy Commission have supplier diversity commitments. Below you will find a list of supplier diversity resources as well as a consolidated list of best practices for achieving supplier diversity:

Diversity and Inclusion Resources:

- [*Equitable Development Toolkit: Minority Contracting*](#)—PolicyLink^{lxvii}
- [*Empower California Act \(AB 865\)*](#)—Requires California Energy Commission to achieve supplier diversity through guidelines, outreach, and implementation^{lxviii}
- [*Utility Supplier Diversity Program*](#)—California Public Utility Commission’s clearinghouse to aid in supplier diversity as stated in General Order 156^{lxix,lxx}
- [*UC San Diego's Small Business Development Office*](#)—UCSD’s commitment to diversity through procurement and business contracts^{lxxi}
- [*Kaiser Permanente Supplier Diversity Program*](#)—Kaiser Permanente^{lxxii}
- [*Supplier Diversity and Competitive Advantage: New Opportunities in Emerging Domestic Markets*](#)—Graziadio Business Review^{lxxiii}
- [*The Business Case for Supply Chain Diversity*](#)—Industry Week^{lxxiv}

Diversity and Inclusion Best Practices:

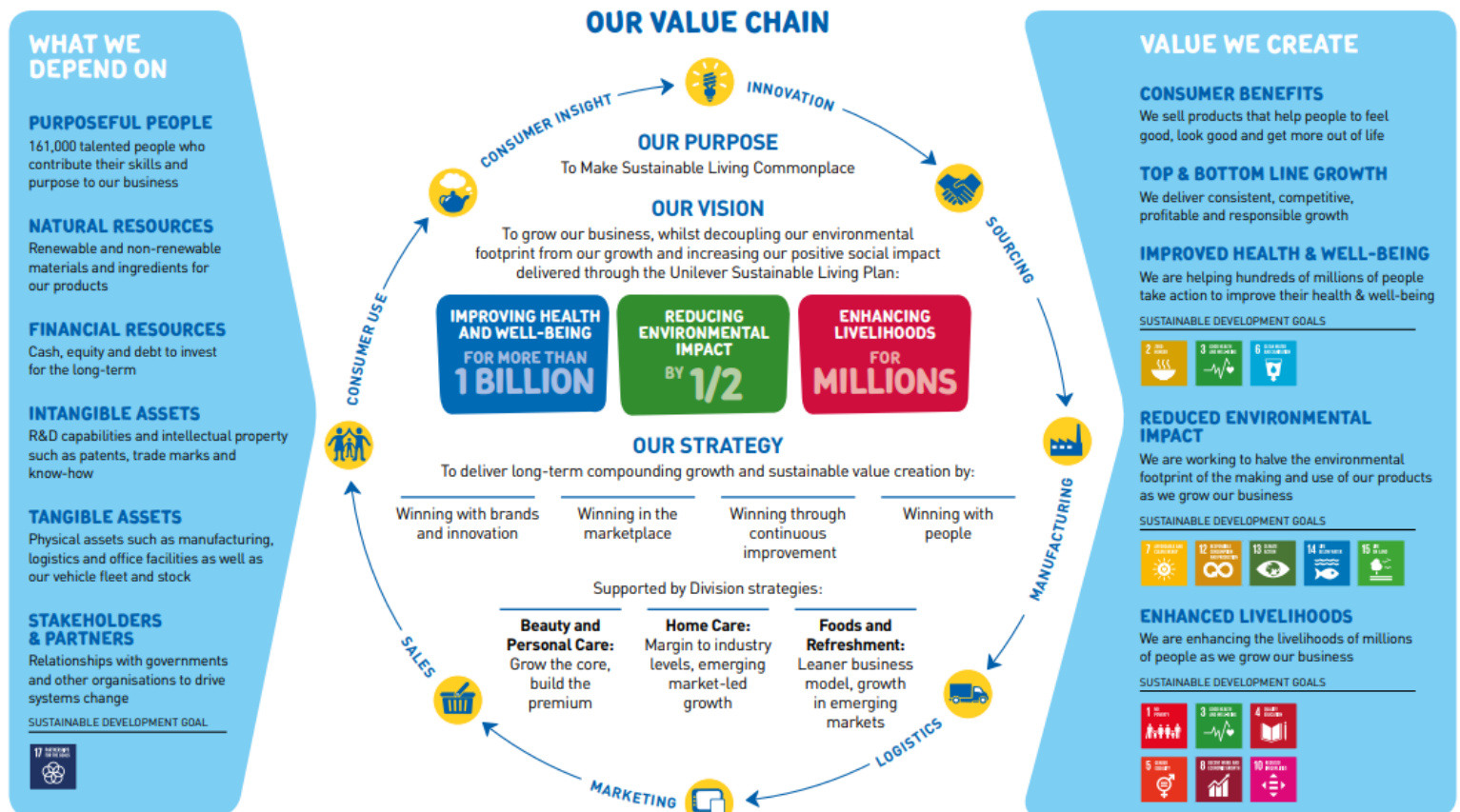
- Establish a supplier diversity commitment with explicit leadership buy-in
- Attend Diversity and Inclusion events to meet with potential suppliers
- Outreach to Diverse Business Enterprises and Women-Owned Business associations
- Collect data on supplier diversity metrics for transparent reporting

- Provide preference to diverse suppliers that have their own supplier and workplace diversity goals

3. Incorporating a Shared Value^{lxxv}

Today, many businesses are finding ways to not only create profit, but to also make a positive social impact on the community, the planet, and people. “[Creating Shared Value](#),” a Harvard Business Review^{lxxvi} article published in 2011, explores how companies generally miss the biggest unmet needs of markets because they focus on short term profits. The authors urge companies to shift into the “shared value” model where a company generates “economic value in a way that also produces value for society by addressing its challenges.” The article explains that when companies focus on profiting while also fulfilling a social purpose, both the company and the community can prosper in a sustainable and self-enriching way. Unilever is an example of a company that has incorporated a shared value in its purpose and vision to create a sustainable growth model that not only benefits the company, but also the communities that it serves as well.

Graphic 5: [Unilever’s Value Chain](#)^{lxxvii}



The graphic above, developed by Unilever, demonstrates the connection that Unilever can create between economic growth and providing societal benefits. The list below includes

intervention points where businesses can begin to create a shared value^{lxxviii} in their value chain:

- Meeting societal needs through products and services
- Serving unserved or underserved customers
- Redefining productivity and reimagining the ways resources, energy, suppliers, logistics and employees are utilized to create win-win scenarios
- Investing in human capital and the supporting institutions that affect the business

VI. How to Measure and Analyze Equity Progress

How is equity progress measured? How do we know that equity goals were achieved?

WHAT DO WE WANT TO ACHIEVE AND WHY?

Evaluation Criteria to Track Success

Measuring and analyzing equity goals with evaluation criteria is necessary to identify program strengths and areas for improvement. The criteria should be designed to help set goals, track progress and ensure accountability in the program. The criteria should also be adaptable because of the ways that grant investments and other factors can change communities over the course of time.^{lxxix}

Data Collection to Learn About Applicant Diversity

Some of the evaluation criteria we suggest below require demographic data of the applicants so the program should include mechanisms to collect applicant data. Such data collection enables program administrators to see which communities and populations the program is successfully targeting in outreach, and which ones are missing. Collecting this information can also help establish an applicant diversity baseline that can be used to set diversity goals. Due to California's Proposition 209, demographic questions cannot be asked in the application itself. Administrators can also collect data by sending all applicants a post-application survey that they complete anonymously. The survey should ask about:

- Where applicants heard of the program
- Accessibility of application materials and technical assistance resources
- How the application process can be improved
- Demographic information: race, gender, address, relevant business certifications (if applicable)
- Geographic information: what city/state the applicant lives in, location of business or company (if applicable)

This data can help the program identify outreach gaps and provide information on how to improve outreach around the state.

HOW TO ACHIEVE IT:

The equity evaluation criteria should be designed to track how the program's actions benefit or harm underrepresented communities. We recommend the following evaluation criteria to track progress in reaching social equity goals:

Goals, Vision and Values – Evaluation
<ul style="list-style-type: none"> • Did the goals, vision and values discuss diversity, inclusion and equity? • How did the goals, vision and values address economic, environmental and energy inequities? How did they address community engagement? • Could someone reading the grant program information for the first time immediately recognize the importance of social equity in the program? • Did the goals, vision and values specify and define communities the program intends to benefit? • How were the equity priorities socialized with partners?

Process – Evaluation
<p>Community Partners</p> <ul style="list-style-type: none"> • Did the program partner with social equity experts and community partners? <ul style="list-style-type: none"> ◦ How many? ◦ What was the community partner's extent of participation in the program development? ◦ How were the community partner's ideas included in the program? If not included, why not? • Did all program partners receive training on social equity and identify ways to advance equity in their program responsibilities? <p>Outreach</p> <ul style="list-style-type: none"> • What outreach media were used to reach underrepresented groups? Were some media not used? If so, why? • Was outreach done primarily through online media? If so, why were in-person outreach or other media not considered? • Based on the applicant feedback survey, what outreach strategies succeeded in bringing in applicants? • Did program's outreach efforts include collaboration with partners who work with historically underrepresented groups? How many and which ones? What did the collaboration look like? • If program is statewide, what outreach strategies were used to disseminate information to all California regions?

- How did the program collaborate with community-based organizations and nonprofits in different California regions?
- Were outreach materials reviewed by equity partners?
- Was outreach material available in multiple languages? Which ones?

Technical Assistance

- How did the program assess technical assistance needs of applicants?
- How did technical assistance resources address the applicant-identified needs?
- Which needs are still needed to be met? How will they be met?

Applicants

- After conducting outreach and offering technical assistance, how many applicants were from a disadvantaged community or low-income community?
 - What was the geographic representation of applicants?
- If businesses are eligible applicants, how many businesses were minority-owned or woman-owned?

Application Development

- How did application questions ask about environmental, energy and economic equity?
- How did application questions ask about community inclusion and governance?
- What was the makeup of the reviewing committee?
 - How many social equity representatives were included?

Program – Evaluation

- How many award recipients focused on creating a climate solution that benefits disadvantaged communities?
- How many award recipients focused on creating a climate solution that targets priority issues disadvantaged communities face?
- How many award recipients scored high marks (above 80%) on the equity section of their application?
- Of the applicants that prioritized equity in their project (or received the top score in the equity section of the application), how many of them were granted an award?
- How many award recipients sited the location of their project in a Disadvantaged Community?
- How many award recipients have partnerships with community-based organizations?
- How many award recipients used all or parts of the community involvement process to work with community-based organizations?
- How were projects community-driven or at least community-informed?
- Did award recipients include the incorporation of workforce diversity or supplier diversity in their project plan?
- How many award recipients focused on creating a shared value^{xxxx} in their project?

VII. Conclusion

To achieve the state's ambitious clean energy goals, we must reduce greenhouse gas emissions and ensure that *all* communities are able to adopt clean technologies to move us toward a clean energy future. Currently, however, low-income communities of color in California lack access to clean energy resources, preventing them from participating in a clean energy economy. Low-income communities of color need long-term job opportunities, innovations that reduce the cost of basic necessities, and clean energy investments that create healthier environments.

Centering equity in clean energy programs and resources is essential to transitioning to a clean energy future where *all* communities have access to clean energy solutions. This framework provides strategies and tools to prioritize and incorporate social equity into climate-related grant programs. By directing resources and solutions to the communities that have been historically excluded from decision-making, California grant programs can help address the environmental and economic inequities that low-income communities of color experience.

As we pave the path toward a clean energy economy, we have an opportunity to place justice and equity at the forefront. Let's not repeat the mistakes and missed opportunities of the past. We must work together, empower one another, and fight to make sure the green economy benefits everyone in California.

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Title 42 of the United States Code. (8) Youth who are in, or have aged out of, the foster care system. (9) Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers. (10) Eligible migrant and seasonal farmworkers, as defined in Section 3322(i) of Title 29 of the United States Code. (11) Individuals within two years of exhausting lifetime eligibility under Part A of Title IV of the Social Security Act (42 U.S.C. Sec. 601 et seq.). (12) Single parents, including single, pregnant women. (13) Long-term unemployed individuals. (14) Any other groups as the Governor determines to have barriers to employment.

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