

Public Funding Playbook: Strategies for Youth Organizations



Photo source: Youth Organize! California

Prepared
by:



LEARNING *for* ACTION

Prepared
for:



About This Playbook

The Purpose of this Playbook

This playbook offers practical guidance that youth organizations can use to leverage public funding streams to support youth organizing priorities in California. The research that informed this playbook examined the opportunities, challenges, efforts, and necessary infrastructure for youth organizing groups to access public funding streams in the state, specifically around youth mental health and wellbeing, education, youth development, and justice realignment. The information presented here is intended to help youth organizations understand the assets they have and what else they might need to support their pursuit of public funding.

How this Playbook came to be

This playbook is an outgrowth of a proposal developed by the California Youth Organizing Funders Collaborative. This ad hoc working group, coordinated by Youth Organize! California, with representatives from The California Endowment, Packard Foundation, Stuart Foundation, Weingart Foundation, and Zellerbach Family Foundation, was formed to home in on key opportunities for philanthropy to increase resources and support for the field of youth organizing. Public funding was identified as an area where resources meant for public good are underutilized by youth organizers, mainly due to the many obstacles smaller organizations face when trying to access these funds. In collaboration with their consulting partner, Learning for Action (LFA), a project was designed to conduct research and share lessons learned from youth organizing efforts to access public funding streams. Reflections from youth organizations gathered through a series of conversations form the backbone of this playbook, giving real life insight and guidance to youth organizations that are exploring the possibility of accessing public funding. This playbook was made possible by funding from The Stuart Foundation, The California Endowment, The Weingart Foundation, and the Funders Collaborative on Youth Organizing. The research process and final product were informed by an advisory committee, comprised of leaders at youth organizing organizations. Many thanks to Katie Moua, Desire Johnson-Forte, Danielle Frank, Lana Tilley, and Ruby Rivera for their insights.

Who is this Playbook for?

This playbook is primarily written for small, growing youth organizing organizations who are interested in pursuing public funding opportunities but may not know where to start or what to expect. However, it is our belief that all youth organizing organizations, regardless of size or experience, may have something to learn from the stories, lessons, and recommendations presented here. Additionally, our hope is that this playbook is accessible to all members within the organizations using it. While organizational leaders are ultimately responsible for the financial decisions that happen within an organization, youth organizers are encouraged to read this playbook and support their organizations in the discussions and next steps that may come from engaging with these ideas.

Note that there is a [general resource](#) from California Association of Nonprofits (published pre-pandemic) that organization may find additive. This guide is specifically for (and informed by) youth organizing groups.

Methods

To better understand the opportunities and challenges in accessing public funding streams in California, LFA interviewed leaders from twelve youth organizations who have experience with pursuing and receiving public funds. Questions focused on the infrastructure, knowledge, and effort required at various points in the public funding process, from applying to award close-out. While shifts are needed at a systemic level to make accessing public funds easier for organizations, these conversations focused on best practices and lessons learned from organizations who have found success, who have learned from setbacks, and who would recommend the endeavor to other youth organizations. LFA also interviewed one budget and policy specialist to round out the research. LFA is grateful to these leaders and their organizations for sharing their expertise with the field:

- Najla Gomez, Capacity Building Director, [Californians for Justice](#)



- Jessica Miller, Director of Development, and Ama Agustin, Grants Manager, [Communities United for Restorative Youth Justice \(CURYJ\)](#)



- Jesús Sanchez, Co-Founder and Director of Economic Justice, [Gente Organizada](#)



- Jose Salvador Orellana, Co-Founder and Lead Organizer, [Loud for Tomorrow](#)



- Ralph Leño Atanacio, Co-Director, [South Bay Youth Changemakers](#)



**SOUTH BAY YOUTH
CHANGEMAKERS**

Introduction

- Nicole Lee, Executive Director, [Urban Peace Movement](#)



- Jesse Ornelas, Director of Programs, [Youth Leadership Institute](#)



- Danielle Frank, Development Coordinator, [Ríos to Rivers](#)



- Nancy Xiong, Executive Director, and Katie Moua, Director of Programs, [Hmong Innovating Politics](#)



- Ruby Rivera, Senior Director of Community Organizing, [InnerCity Struggle](#)



- Desire Johnson-Forte, Founder and Grants Manager, [The BIZ Stoop](#)



- Lana Tilley, Development Director, [RYSE Center](#)



- Alex Briscoe, Principal, [California Children's Trust](#)



Table of Contents

This playbook begins with an overview of public funding, before exploring the phases of public funding in greater depth. For each of the phases after the Preparation + Readiness Table, sections share the basics about what organizations should know, the key needs, practices, and recommendations for each phase, and other considerations. These sections also contain spotlights, where users can read real-world examples of challenges, solutions, or observations from experienced organizations. Case studies are included to showcase the work and lessons of organizations whose experiences may be unique or not fully captured in the themes presented for each phase.

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Public Funding Overview

What is Public Funding?

Public funding is money provided by the government (i.e. the public treasury) for goods and services that benefit the public. These funds mainly come from tax revenue, fines and fees, as well as bond measures (which may be paid off eventually by tax revenue). In the context of this playbook, public funding refers to grants or contracts provided by government entities (at the state, county, city level, etc.).

Why apply for public funding? What makes it worth the effort?

Public grants and contracts allow organizations to access larger, transformative amounts of funding compared to private funding. That, along with longer term funding periods, can provide organizations with more stability. Often these are multi-year contracts that can help build internal capacity for an organization, although that is not always the case. For example, one-time pilot program grants are short-term engagements that provide an opportunity for more innovative work or interventions. In addition to the financial benefit, pursuing public funds can provide other benefits to an organization, such as granting them greater visibility that enhances their reputation in the field, broadening their network, and the ability to expand their services and gain access to populations that were previously inaccessible.



"[Public funding] can give credibility [to an organization] and open a doorway to accessing more public dollars [...] establishing relationships in the county and city with people who might be the people we are running into when running our campaigns."

- Ralph Leaño Atanacio, *South Bay Youth Changemakers*



"There's a lot of funding opportunities out there at the state, county, and city level. Right now, we're in a time of transition. **The state is realizing that some of these smaller organizations are having a great impact on their communities.** They [the state] is starting to pivot from reimbursement to more start-up, seed money."

- Jesse Ornelas, *Youth Leadership Institute*



Photo source: Youth Organize! California

Preparation + Readiness Table

What You Need + Where to Start

This playbook as a whole is intended to help organizations think about and prepare for how they might pursue public funding. However, if organizations want to focus on the most important areas for consideration, they can be found in the tables that follow. These tables list the key places where organizations should start, from an external as well as internal perspective. They also direct readers to the areas throughout the playbook (though section names and icons) where more information can be found on those particular topics, including additional context and experiences from other organizations. At the end of the playbook, worksheets are available to help organizations think about their assets, needs, and next steps in these areas.

External Knowledge, Relationships, and Resources





What Organizations Need:	For more on this and why it is important, see:	Look for this icon:	Where organizations might start:
Close relationships with private funders and peer organizations	<ul style="list-style-type: none"> ▪ Finding Public Funding Opportunities (Networking and Relationships) ▪ Receiving + Using Public Funding (Other Considerations) 		Asking current partners for referrals and introductions; participating in conferences and other networking events; exploring new ways to build your network
Relationships with elected and administrative officials or those connected to public funding sources	<ul style="list-style-type: none"> ▪ Finding Public Funding Opportunities (Networking and Relationships) ▪ Receiving + Using Public Funding (Other Considerations) 		Joining councils or participating in other opportunities that bring staff into shared spaces with public officials
Specialized support if internal knowledge and expertise cannot support the needs of the grant/contract	<ul style="list-style-type: none"> ▪ Applying for Public Funds (Internal Systems and Support) ▪ Receiving + Using Public Funding (Financial + Administrative Management) 		Hiring an accountant, grant manager, or grant writer

To find public funding grants and contracts available for youth organizations in California, you can explore resources here. For a list of public funding resources mentioned in interviews, please see here.

Continue onto next page for Internal Knowledge, Infrastructure, Systems, and Processes

Preparation + Readiness Table

Internal Knowledge, Infrastructure, Systems, and Processes

What Organizations Need:	For more on this and why it is important, see:	Look for this icon:	Where organizations might start:
<p>Organization and program clarity, including a strong sense of your organization’s mission, vision, and values, and the work you are well-positioned to do</p>	<ul style="list-style-type: none"> ▪ Finding Public Funding Opportunities (Determining Fit; Other Considerations) ▪ Applying for Public Funds (Internal Systems and Support; Other Considerations) 		<p>Developing a Theory of Change and/or workplans; holding internal conversations on organizational strengths, needs, and nonnegotiables</p>
<p>Financial preparation, including audits on financials for orgs with 2M+ operating budgets, the ability to track costs/expenditures, a point person to manage finances, strong financial reserves, accounting systems that can support up to quarterly reporting, and awareness of insurance requirements</p>	<ul style="list-style-type: none"> ▪ Finding Public Funding Opportunities (Determining Fit; Other Considerations) ▪ Applying for Public Funds (Financial Considerations) ▪ Receiving + Using Public Funding (Financial + Administrative Management) ▪ Reporting + Award Close Out (Systems for Reporting; Before Grants or Contracts End) 		<p>Investing in a tracking system/financial management tools; building practices around money management; planning for cashflow issues; exploring grants through intermediaries</p>
<p>Internal capacity, including point people/clear responsibilities for applications, data collection, and reporting, and strong processes for communication and collaboration</p>	<ul style="list-style-type: none"> ▪ Applying for Public Funds (Internal Systems and Support; Other Considerations) ▪ Receiving + Using Public Funding (Program Delivery) ▪ Reporting + Award Close Out (Internal Supports and Capacity; Other Considerations) 		<p>Allocating time and resources for program staff to engage in grant applications, data collection, and reporting; understanding and adapting current roles and collaboration practices to account for new data needs</p>
<p>Internal systems, including tools/ways to track programmatic data/metrics and impact, expenditures, and budgets by funding stream, and clear expectations around use/maintenance</p>	<ul style="list-style-type: none"> ▪ Applying for Public Funds (Internal Systems and Support; Other Considerations) ▪ Receiving + Using Public Funding (Financial + Administrative Management) ▪ Reporting + Award Close Out (Systems for Reporting; Other Considerations) 		<p>Investing in data collection and storage tools; developing organizational processes and expectations around data collection</p>

Finding Public Funding Opportunities

The Basics

When seeking new public funding opportunities, organizations must consider several factors including what is the best fit in terms of size, cost, and the values and mission of the organization. In addition, the application process itself can be time and resource intensive. One way to help ensure your organization is setting itself up for success and conserving resources is to leverage existing relationships to help source and vet opportunities, while also doing the necessary due diligence to confirm that a potential grant or contract is a good match.



Networking and Relationships

Organizations can gain access to and information on potential public funding opportunities through relationships with public officials. This includes being in conversation with elected and administrative officials at the city, county, and state level. For example, one organization mentioned they have directors and managers who sit on councils with government forces. When they hear of an opportunity, they can reach out to those contacts to help gauge if their organization would be a good candidate. Another organization suggested reaching out to congressional representatives, as some have staff dedicated to forwarding information on upcoming funding opportunities.

Leverage current working relationships with funders and foundations. Organizations shared that the connections formed through their current work with public and private funders in the community often led to new opportunities. For organizers working with private foundations, they suggest asking for introductions not only to other foundations, but also to county contacts and others in the public funding space.

Leaning into relationships with other nonprofit organizations and trusted people in your network can lead to more promising funding opportunities. Many organizations cited their current network as a helpful source of information for potential public funding opportunities. One organization noted they successfully applied to a grant after being referred by a former collaborator who worked with the funder. Referrals like these are most beneficial when coming from a trusted source familiar with your organization. For those seeking to build up these relationships, actions such as going to conferences and joining committees can help make those in person connections. Organizations may also benefit from getting a mentor who is familiar with the landscape and can help vet potential funders.



“[I] have been able to find the right folks who understand the sector and understand the nuances that come with different funding sources, and I trust that anything that they bring to me is something that aligns with the work that I'm doing, that the people on the other end of that funding who are giving the funding out, that they are thinking about our communities. That they're wanting us to be in there.”

- Danielle Frank, *Rios to Rivers*

Finding Public Funding Opportunities



Determining Fit

Weigh the financial cost versus financial benefit of a prospective funding opportunity before you apply.

Organizations emphasize the need to check the financial requirements and size of the grant or contract against organizational capacity. An award amount that is too big will be burdensome to manage if you don't have staff or infrastructure to support the work. If it is too small, it might not be worth the effort it would take to apply and meet the deliverable and reporting requirements.



"We really look at **how much it costs versus how much we will be spending**. A lot of times [funders] ask for very specific requirements that means we would need to pay for a new position or maybe pay for a few different things and if it doesn't balance out, we won't go for those."

- Ama Agustin, *Communities United for Restorative Youth Justice*

It's common practice for public funders to require organizations to cover the cost of the award up front, then get reimbursed either through installments or at the end of the engagement. Organizations need to assess their financial reserves and capacity to support the work before applying (see [Applying for Funds, Financial Considerations](#) section for more). If your organization does not have that ability to float the money needed, one option would be to prioritize grants with proactive funding models where money is given in advance rather than reimbursed.

Look for funders and opportunities that align with your organization's mission. Have a clear understanding of your organization's goals and programming. Grounding in your organizational mission, vision and values and connecting that to your areas of work, will help you evaluate whether a grant or contract is a good match. Prioritize opportunities where your organization is already doing the work and can present as more established. A proven track record can improve the chances of being selected, but it is also in an organization's own interest to ensure any funding will support existing work and help take it to the next level. Pursuing funding where there is a mismatch can lead to mission drift.



Photo source: Julie Leopo

Finding Public Funding Opportunities



Spotlight On: Advocacy and Influence



Organizations working in advocacy need to carefully consider pursuing and accepting public funds, especially when their work puts them in conflict with public entities. Organizations **caution against accepting funds that would prevent an organization from challenging public entities** they are likely to engage through their advocacy work. Ama Agustin shared that their organization, Communities United for Restorative Youth Justice (CURYJ), looks at not just the type of funding but what type of restrictions come with it. If there are certain caveats around what their organization is allowed to address that compromise their values and integrity, they would not apply for that funding.

When evaluating the whether a potential source of public funds will be a good fit for your organization, it's important to consider **the needs of the community and population you serve**. Jesse Ornelas from the Youth Leadership Institute (YLI) recalled having to make such a decision when the Merced County probation office reached out with a funding opportunity. Ornelas shared that he was hesitant at first, given his own political stance against police brutality, but took the time to consult with his peers and elders in his community. Ultimately, Ornelas and YLI decided to take the contract because it would allow them greater access to young people that could benefit from their assistance.

Spotlight On: Balancing Public and Private Funding



Organizations can minimize undue influence from funding sources by balancing what portion of their budget comes from these sources. For example, Nicole Lee with Urban Peace Movement shared that her organization initially did not seek out public funding because they wanted to maintain their independence. Over time, they found public funding opportunities that were a good fit, but they only **aim for around 30% of their overall budget to come from public sources**. Given their advocacy and organizing goals, they want to be conscious of how much of their money is coming from the government, as most of their advocacy centers on appointed decision makers.

Finding Public Funding Opportunities



Other Considerations

When seeking out public funding, organizations might consider the following.

- **Look for funding geared towards different types of work.** Historically, public funding hasn't primarily focused on organizing and advocacy work, but organizations share that they see progress being made in this area. For advocacy organizations, funding that aims to support systems change and impact may have a broader set of criteria that would better apply to their organization. Pilot programs are another possible source of funding that can also create avenues for organizations to give feedback and impact the government programs behind the funding.
- **Organizations should consider the long-term implications of potential public funding opportunities.** For smaller organizations, new funding streams may mean a lot of new growth, which comes with its own set of challenges - including keeping true to your identity as an organization and preventing staff burnout. In addition, this growth in capacity can be hard to maintain if there is uncertainty around how secure these funding streams are long term. For example, one organization mentioned receiving funding through California's [Proposition 64 Public Health & Safety Grant Program](#) (i.e. the cannabis tax), but it remains unclear what would happen to that funding if those tax dollars were no longer earmarked for youth programming.



"I see pilot programs as a way to provide tribal insight to the philanthropic community. **This is a learning moment [...]** a good way to ensure tribal voices are incorporated into [program] thinking going forward. Pilots are likely not the easiest, but worth it for us and other organizations in the tribal communities."

- Danielle Frank, *Rios to Rivers*

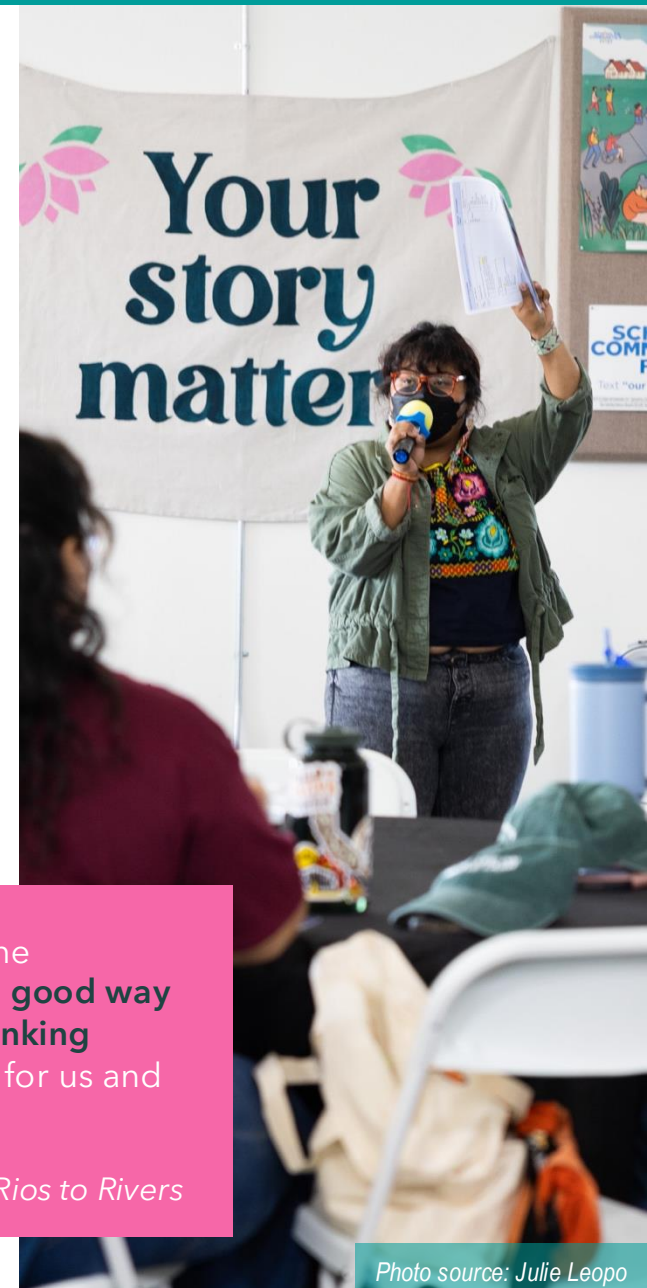


Photo source: Julie Leopo

The Basics

Applying for public funds can be a lengthy and complex process for an organization, requiring a lot of preparation and planning. Compared to private funding, the requirements for government grants and contracts can be more numerous and rigorous. This can feel overwhelming, but there are steps you can take as an organization to help streamline the process and strengthen your application.



Internal Systems and Support

Use internal systems to complete the application process more efficiently. Systems that support with program management (tracking numbers, events, activities, etc.) can also be used to supply data for applications. Knowing what kind of data your organization has on hand and where you can pull it from can save time when compiling information for an application.

Know the landscape and the relevant research around your work. It's also helpful to understand the research and data around your organization's work (e.g. data gathered from state websites, sociological research, etc.). This can help make a strong case for why your organization's work should be prioritized. For organizations who engage in direct service work, tying your work to evidence-based practices can also strengthen your application.

Have dedicated personnel leading the application process. Organizations benefit from having a point person (or persons) experienced with the public funding process leading the work (e.g. outlining the workplan and budget) and collaborating with staff to translate an organization's vision into language that resonates with the funder. This position can be internal (e.g. director of development or grants manager) or external (e.g. grant writing consultant). Strong communication between the development team and staff is key to making sure there is clarity around how this funding will contribute to the growth and development of programs and the organization at large. Collaborating with these teams to create pre-existing language and budgets that you can tailor to the application will also save time.



"While we know our programs' impacts and community-defined evidence, we often spell out linkages to evidence-based programs. This research can take time and it's helpful to plan for in the application process."

- Lana Tilley, RYSE Center

Applying for Public Funds



Financial Considerations

Get clear on the financial realities of your organization. It's important to have a clear understanding of the financial requirements of a potential funding opportunity as well as the ability of your organization to meet those requirements. For example, it's common for public funding to be reimbursement-based, so you want to be sure your organization has the financial capacity to cover the cost of doing the work up front.

Make sure your organization is prepared to navigate any cashflow issues. There might also be unforeseen delays in payment that place an additional burden on the recipient. One organization shared that they had to furlough staff and delay programming because they were waiting on a payment from a contract that was delayed over six months.



"I see that as a deliverable itself [...] agreeing to all these reports. **We need to make sure that we have folks getting paid to do them** [...] that's something I always am intentional about is making sure that we're writing in enough resources for our development team."

- Danielle Frank, *Rios to Rivers*

Budget for the true cost of the work for your organization. This means accounting for all activities associated with the work, including those not explicitly outlined in application. Such activities may include trainings for staff that are required in order to deliver services, or the time it will take to set up necessary tracking systems and to fulfill reporting requirements. You should be aware of the professional development needs for your organization and see what capacity building supports are offered by the funder. Be prepared to have conversations with potential funders to make sure the costs associated with activities are adequate and equitable.

Organizations must be prepared to meet audit requirements. Nonprofits with annual gross revenues of \$2 million or more must have audited financial statements prepared annually by an independent certified public accountant. This may be an overwhelming process for organizations who have not been through it before, and leaders should seek support and guidance if useful.



Photo source: Youth Organize! California

Applying for Public Funds

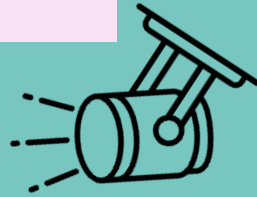


Spotlight On: Fiscal Sponsors

For smaller organizations, working with a fiscal sponsor or an intermediary (see below) can help remove hurdles to qualifying for funding and provide support that can ease the application process. Generally, **fiscal sponsors have an ongoing relationship with their sponsored project and can provide financial, administrative, and management support.** The supports may vary depending on the specific sponsor and type of arrangement, but these partnerships can be especially helpful for organizations that lack the needed organizational structure and capacity to apply for public funds. For example, a fiscal sponsor can help provide the transactional services such as receipt of funds, provision of insurance, submission of reports in exchange for a management fee. Ralph Leaño Atanacio of South Bay Youth Changemakers (SBYC) shared that working with their fiscal sponsor, the Chinese Progressive Association (CPA), allowed them to successfully apply for and manage a grant. CPA has a finance team that is able to handle all the financial management responsibilities and reporting, allowing SBYC to focus on the work and developing their own internal capacity. One limitation Atanacio pointed out is that their organization has to check with their fiscal sponsor before applying for any government grants to ensure the award amount won't push CPA over the threshold that would trigger an audit (see [Applying for Funds, Financial Considerations](#) for more on audited financials).

Spotlight On: Intermediaries

Another option for smaller organizations or organizations new to the public funding process is to look for grants that are managed by intermediaries. **Intermediaries work on behalf of the funder to process applications and distribute the funds.** The experience will vary depending on the intermediary, the funder, and the agreement between those two entities, but organizations share that working with an intermediary can make the public funding process easier for organizations because of the support and partnership they provide. Jose Orellano (Loud for Tomorrow) shared that in his organization's experience, funders acting through intermediaries may be more lenient when it comes to certain requirements, and they provide more capacity building support for the work (fundraising, communication, evaluation, etc.; see [Reporting + Award Close Out, Systems for Reporting](#) for more on this example).



Applying for Public Funds



Other Considerations

Organizations shared the following tips to keep in mind as you move through the application process for public funding.

- **Move past intimidation.** Applications for government grants and contracts can be complicated, but if you have some systems set up you can simplify the process versus starting from scratch every time you need to fill out an application. Even if an application feels like a stretch, it might be worth it to gain some experience and possibly some recognition for your organization's name and approach. Other opportunities and new connections might come out of that work.
- **Tell your organization's story in a way that translates to public funders.** Focus the narrative on the entirety of your organization's work and highlight your priorities for funding so that funders have a clear understanding of what your organization does well. As mentioned earlier in this section, you should include data or evidence to support your application when able.
- **To the extent possible, give yourself time to prepare.** Government grants and contracts are usually (but not always) administered annually over a set number of years. Be aware of the relevant budget approval cycles at the municipal, county, and state level and plan accordingly.
- **Ask questions at every stage of the process.** If a funder offers a bidder's conference or office hours for prospective applicants, make sure to attend and come prepared with questions. Ask specific questions about outcomes and responsibilities early on. Funders may have a goal, outcome, or need in mind that they aren't forthcoming with in early stages. Ask if a program's impact is going to be used to push a policy forward or shape future budgets. The answer could change your approach, not just to the application process, but to the work overall. If you do not end up receiving the grant or contract you applied for, ask for feedback on rejected proposals from funders and others who might have insight into what can be improved. Save those materials so you can revise and repurpose or resubmit.



Photo source: Youth Organize! California

The Basics

Once public funding grants or contracts have been awarded, organizations must be prepared to receive and use the funds. There are typically stringent requirements around how public funds can be used, so organizations must be diligent in accounting for how funds are spent, as well as ensuring their work is delivered in a way that meets expectations.



Financial + Administrative Management

To receive and properly utilize public funds, organizations need a strong financial management system. Because each dollar needs to be accounted for, organizations need to have the ability to allocate and track costs for different funding streams. In practice, organizations have found success with creating separate accounts for grant or contract spending and separate timesheets for monitoring staff time.

Organizations should get support in financial and administrative management where needed. If organizations do not already have systems or processes that enable close tracking of financial data, investing in such tools is an essential first step (see [Reporting + Award Close Out, Systems for Reporting](#) for more). Organizations must also recognize when they have needs that are beyond their skillset and seek help. One organization said hiring an accountant with experience in government contracts was their “biggest support”; this person had the expertise to modify budgets, track data, create protocols for staff, and provide guidance on new technical elements for the organization. Another hired a grant manager to help build internal structures.

Communication and transparency around finances with staff is critical. Transparency on grant budgets and sharing general financial information with staff can right-size expectations about how money can and will be spent. One organization described providing a financial 101 session to staff, with the goal of helping staff understand the limits of public funding. Ensuring budget awareness among program directors and staff also allows for real-time decisions and pivots to be made. Organizations spoke to the importance of providing regular updates to their colleagues, so that dollars can be used effectively and meaningfully from the outset, and organizations are not placed in the unfortunate position of having to hurriedly spend down dollars at the end of a grant or contract period.

There may be delays in receiving public funds. Even if an organization does everything correctly, bureaucratic red tape, or challenges on the public funding agency's end can delay payments. One organization leader noted that installments can take time, especially if the state has not approved the budget or review of reports are taking longer than anticipated. In one instance, an organization expected funding to come in November and still had not seen an installment by June (see [Applying for Funds, Financial Considerations](#) for more on the importance of understanding your organization's financial realities).

Receiving + Using Public Funding



Financial + Administrative Management Continued

There will be a change in the balance of administrative work and direct services. Particularly for smaller organizations, where historical focus may have been on service delivery, leaders should understand that more time will need to be spent accounting for program time and dollars. One leader talked about needing to bring on another staff member to help carry the administrative load, sharing:



"I always had the agenda of limiting how much of our resources went to admin-only positions, because I wanted to make sure that most of our energy and resources were going to direct service type of work. [But], just through our growth, **has been kind of a humbling experience and observation that in order to sustain this, you need to build out the administrative team, too. And it needs to be solid.**"

- Jesús Sanchez, *Gente Organizada*



Program Delivery

Program teams need clarity on grant deliverables and deadlines. Organization leaders agreed that during program planning and throughout the grant lifecycle, those involved with program delivery should be aware of the grants that are supporting programmatic work, the deliverables associated with each grant, and the reporting deadlines. This ensures appropriate planning to spend down dollars, supports the reporting processes later on, and helps alignment and execution on program goals.

Additional safety measures may be required of the organization to stay in compliance with the grant. Several organization leaders shared that they had to take on specific insurance or draft new protocols, policies, or safeguards for events or activities for public grant funded programs, in addition to what they already had in place as an organization.

It is important to be aware of restrictions around public funding.

While organizations may be familiar with the practice of using funds for specific purposes (through experience with private funding that is restricted or not granted for general operating), rigid rules can come into play with public funding. Leaders named that often public funds cannot be used to cover things like food, swag, stipends, salaries. One shared an example of being unable to purchase anything that would outlast the program, such as technical equipment, even if it was needed for program delivery. Some grants require adherence to communication standards, where written materials must have a certain color or layout, use a logo, or say who is sponsoring the work. At a higher level, funding might be specified for a specific geographic area, population, or area of focus. Programs may also need to change the way they collect data from participants to support reporting, ensuring funds are spent in accordance with grant or contract parameters.

Receiving + Using Public Funding



Spotlight On: Creative Problem Solving for Restrictive Grants

Many times, public funds will come with geographic restrictions, meaning grant dollars can only be used to serve people who live in a specific area. Ríos to Rivers, an organization that works with underserved Indigenous youth to connect them to their local waters and develop them as environmental stewards, found it frustrating that one source of funding was only allowed to be used for those who live in California – particularly when rivers run through multiple states, and geographic constraints outlined by states are not recognized by the tribal communities that span across regions. In this case, the organization **made the case for greater inclusion directly to the funder**, and the funder was willing to change their restrictions, allowing people in both California and Oregon to be served by grant dollars.

Organization leaders stressed the importance of **having private funds to cover the gaps** programs might face due to public funding restrictions. If there are elements of a program (i.e. stipends or equipment) or particular populations (i.e. undocumented community members, or participants from outside a local region) that cannot be served through the use of public dollars, other funding streams that can make up the difference are critical. Ruby Rivera, of InnerCity Struggle, shared an example of a grant where funds for programming were only made available for youth who were assessed to be at high risk for gang involvement. Given that youth at various levels of risk could still benefit from the programming, and that youth may be wary of answering honestly on a risk-assessment survey, the organization decided to use private funding to cover the costs of program delivery for those who did not qualify, so no one would be turned away.

Organizations recognize that restrictive funding may mean communities need to be **kept informed and given choices about changes**. Jesus Sanchez of Gente Organizada shared that he has seen other organizations who try to tap into city funds that come from the federal government have to give money back; when funds require the collection of personal information like social security numbers, community members may be unwilling to share the data that is required to receive the publicly funded service. Currently, Gente Organizada is about to go through the certification process to get all staff peer-to-peer certified, positioning themselves to study how they might tap into Medi-Cal funding. However, because they work with an immigrant community and do not currently do a lot of data collection with the people they work with, Sanchez recognizes it will be important to have open conversations and provide choices. If they were to switch their approach and tell folks coming into their spaces that it is a requirement to tap into Medi-Cal to receive services, the organization "might not exist tomorrow." Other organizations agree, sharing that giving the option to opt out, and clarifying upfront why information is being gathered and how it will be used are best practices.

Receiving + Using Public Funding



Other Considerations

There may be additional benefits to participating in public funding processes that organizations should be aware of and capitalize on.

- For example, one advantage organizations mention is **the ability to connect and learn from other organizations doing similar work**. One organization spoke of the opportunities provided to connect virtually and in person with other funded partners and discuss the challenges and successes they've experienced as well as how to most effectively execute on program delivery.
- **Cultivating relationships with funders.** An organization that has worked with several funders in the public sphere stated that funders will often organize regular calls with funded partners, during which they provide a lot of helpful information and training that can aid in navigating the reporting process. It also gives folks the opportunity to develop relationships with grant managers and other individuals that can evolve into a beneficial professional relationship.
- **Increased exposure and credibility in the field.** Once an organization has successfully secured public funding, that can help establish a track record not just with that funder but also lend credibility to the organization in the field at large. This has the potential to grow their network and lead to further funding opportunities.



"After successfully completing the first grant contract, we found that it lent [our organization] some credibility, **making it easier to get funded by different agencies.**"

- Jesse Ornelas, Youth Leadership Institute

Photo source: Youth Organize! California

The Basics

Reporting is time intensive, and it can be challenging to manage reporting alongside program delivery, especially for smaller organizations. Therefore, it is important for organizations to plan accordingly, thinking through what internal systems, practices, and resources will be required to meet grant and contract requirements. The award close out process also offers notable lessons, affirming the value of timely communication and financial management processes.



Systems for Reporting

Many organization leaders shared that funders (both public and private) will often have their own reporting forms and requirements, and they all look different. One example included the city of Los Angeles, where even at the city level, every department has different reporting needs and requirements. The cadence of reporting requirements may also look different, with some organizations needing to submit data on a quarterly basis. While organizations need to be prepared to learn the systems, adopt the tools, and/or comply with the unique asks of funders, centralizing your own data and knowing how to pull what you need can be immensely useful, rather than regularly redesigning internal systems to meet the varying needs of funders.



Photo source: Youth Organize! California

Developing systems and processes to track, store, and access your data will help you understand your impact, make reporting easier, and build organizational strength and capacity. When possible, organizations recommend modifying your existing tracking systems and evaluation process to support your organization in meeting reporting requirements. For organizations who are just beginning, it will be important to invest time and effort into building the systems that will serve your organization in the long-term. Organization leaders recommend starting with a strong platform or database to store outcomes, as well as reporting templates or internal spreadsheets for tracking data and metrics. Staff need to know how to use the tools, why tracking/data collection is being done this way, and the expectations around use. Internal systems will also help organizations better understand the impact of their work and build their own capacity (see [Spotlights On the Value of Strong Data Systems](#) for more).

Reporting + Award Close Out



Systems for Reporting Continued

Timely record keeping is an essential practice. Almost every organization spoke of the importance of updating data promptly and correctly, with several recommending updating records (particularly time and expenditures) on a weekly basis. Not only does this approach avoid the scrambling at the end of the month and trying to remember where receipts came from, but it helps build a better understanding of how dollars are flowing.

Reporting may be less intensive for those working with an intermediary. Organizations with experience receiving public funds through an intermediary report that there is often greater flexibility, guidance, or leniency when errors occur.



“[Our intermediary] will give us more time or support on reporting if we need it. If we need to update or do a modification, they are open to it and **will support us through that process** to make sure we are using our funds in a timely manner and have the support from accountants on their end make sure we adhere to the rules. [...] When we are not meeting expectations because grants were delayed or the money hasn't been given from the state, they [...] walk us through different scenarios for **how we can continue to achieve the goals** we set for ourselves.”

- Jose Salvador Orellana, Loud for Tomorrow

Photo source: Julie Leopo

Reporting + Award Close Out



Internal Supports and Capacity

Organizations need dedicated time and staff to support with reporting. The organizational structure around reporting may vary, as each organization is structured differently; however, all should be prepared to set up some sort of approach to meet the demands of this time intensive requirement. In general, strong communication between financial teams (or personnel) and program teams is critical for a smooth reporting process. Connecting spending on the financial side and quantitative data and qualitative narrative on the program side is beneficial not only for reporting, but for ongoing alignment. One organization leader shared that even if your organization has a person or team dedicated to reporting, it is beneficial if program directors (or those in an executive/leadership position) have an understanding of the reporting requirements and are able to provide metrics or impact data on the programs they oversee. Smaller organizations have found success in doing grant management and reporting by committee, through biweekly meetings. This approach has reduced isolation and the siloing of information, built organizational capacity, and created an "ecosystem" that supports growth. Ideally, organizations will have appropriately budgeted for the staff time that will be devoted to reporting (see [Applying for Funds, Financial Considerations](#) for more).



Photo source: Youth Organize! California



Before Grants or Contracts End

Public dollars that are not used by the close of the grant or contract period will have to be spent down or returned. As has been previously described, organizations should have a plan for how to use public dollars and have regular touchpoints to track planned spending against actual use. This way, there will not be a surprise surplus at the end, with staff members put in the position of scrambling to find uses for dollars before they are lost. It also means funds can be spent more intentionally over the course of the grant or contract period.

Anticipate and proactively plan for what the end of grants or contracts will mean for staff and programs. Positions or programs might be impacted or eliminated when grants or contracts come to a close, so it is important to be upfront and in regular dialogue with staff on what they should expect. Ideally, over the course of the grant or contract, organizations should work on developing a strategy to maintain increased staffing and program expenses through other funding sources.

Reporting + Award Close Out



Spotlight On: The Value of Strong Data Systems

While it can be daunting to invest in data management systems and set up internal processes around data collection practices, building a strong internal culture around metrics and learning can support organizations beyond grants and contracts. Danielle Frank, Development Coordinator at Ríos to Rivers found that, **“Being able to understand the impact we are having is so beneficial for us in how we navigate programs 10 years from now. It will help us be our own evaluator. It will help us broaden our own program and strengthen it.”** Others agree, sharing that the work they do to centralize quantitative metrics and program narratives not only helps with efficiencies in reporting, but can also be used for strategic decision making, future applications, and in other instances where organizations seek to share the value of their work.

Spotlight On: Rising to Reporting Challenges



Organizations spoke of the hard-won lessons through lots of trial and error with reporting. One organization developed templates for staff to fill out to track program work, in an effort to support their teams, reduce duplication, and ensure collected data could be easily copy-pasted into reports. Others emphasized the importance of training staff on how to use data tracking tools, setting expectations around usage, and communicating the value of these additional asks on their time. A few shared that they try to have reports completed 2-3 weeks before they are due. Several noted they are **still working through the challenges** of converting funder-required tools into something that will work for their teams. There are not always easy solutions, and even organizations who are experienced with public funding still struggle with elements of the process.



Other Considerations

Organizations offered other things to keep in mind during the reporting process:

- Organizations shared that once they started receiving public funding, they were **under greater scrutiny**. Funders can also have **stringent criteria, which may feel formal or not aligned** with how organizations operate, particularly those centering healing and justice (see [Receiving + Using Public Funds, Program Delivery](#) for more on creativity around restrictions). While organizations have worked hard to build their team capacity and develop the tools they need to adhere to grant requirements, they also felt it was important to acknowledge the emotional component of these new and added pressures.
- **Small errors can make a big impact.** One organization described how a rounding error in an excel worksheet led to delays in payment, many back-and-forth communications, and a lot more work. For grants and contracts with quarterly reporting, this can have a cumulative effect, with staff needing to devote time to corrections while still tracking work and spending for the present quarter, all without the next funding installment.
- **Reporting time periods for public grants might not align with an organization's fiscal year.** Some organizations expressed that public grants had more changes or shifting due dates when compared with non-government funders. Others noted that due dates may fall at inconvenient times for organizations. Awareness, backwards planning, and open communication with funders are all tactics that have helped experienced organizations navigate these challenges.



Photo source: Julie Leopo

DANIELLE FRANK

Photo source: Ríos to Rivers website

*Development Coordinator at Ríos to Rivers, shared important reflections on the **unique challenges and recommendations for organizations who work with tribal communities.***



THE CHALLENGE: Capacity.

There is currently a “*lack of understanding and training in tribal communities*” which means not enough people have the training in grant writing, contracts, or the liability and insurance issues that come up in public funding. This lack of understanding and training can be attributed to the absence of significant support, specifically for more rural communities.

THE RECOMMENDATION: Invest in your people.

There are opportunities to build skills and better understand the philanthropic sector, and investing in individual or multiple members of staff will not only build organizational capacity, but the capacity of tribal communities. Danielle advises:



“Invest in them, send them to grant writing classes, look for resources for grant writers, connect them with other organizations who want to help people get this training, connecting with individuals who can provide this expertise. **Because once we have more Indigenous grant writers and people in tribal communities who can do this it will break that barrier a little bit.**”

Case Studies: Organizations Working with Tribal Communities

THE CHALLENGE: Insurance.

Meeting insurance requirements of public funders can be a barrier for many organizations, but it is particularly challenging for tribal and rural communities, who experience greater challenges in getting insurance companies to work with them. Insurance companies often have less experience with both groups. Danielle explains:



"[Their] reasoning is because we are sovereign nations, working within sovereign nations is **really difficult** when there are maybe different laws, policies, agreements, etc. than a regular state or town. And so that's something that I have navigated a lot within organizations, **is gaining access to the right insurance to apply for these grants** [...] which are 10 times harder and 10 times more expensive for us to have than anybody else. **And so that's a really big nuance that you don't know about until you run into that problem.**"

THE RECOMMENDATION: Find Mentors.

While systemic changes are needed to address these and other barriers, leaning on those with more experience in navigating the current system is a useful approach. Danielle offers:



"**The insurance companies need to change their whole vibe.** But you know, at the end of the day, if you find somebody who has that expertise - they're out there - and just to connect with them, partner with them. **Let the people who have found solutions be your teachers in these moments.**"



Photo source: Ríos to Rivers website



Photo source: Ríos to Rivers website

Case Studies: Organizations Working with Tribal Communities

THE CHALLENGE: Distrust.

It can be challenging for Indigenous communities to come to terms with applying for, accepting, and believing they can rely on public funding, particularly at the state or federal level. As Danielle notes:



“A lot of these resources do come from **the exploitation of our territories, the exploitation of our people**, and the fact that we have to fill out these grants and do this **really hard work** to gain the mere access to funding that comes from exploitation of Indigenous territories? It does rub a lot, including myself, the wrong way a lot of times, and **it feels so hard to engage in a really trusted partnership with folks who really don't always have our best interest at hand.**”

THE RECOMMENDATION: Have open conversations with community.

Inviting community into dialogue to share their concerns, voice their questions, and hear how you will use the funds to serve the goals of your organization and needs of the community can go a long way to building understanding and confidence in pursuing public funding. Danielle creates these spaces at annual dinners, where they share their organization's impact report, discuss their funding sources and how money will be used, and respond to questions and comments:



“Be transparent around your funding. **Make sure that you know your funders are aligning with your goals and vision**, and that you can, you know, explain that to your community.”



Photo source: Ríos to Rivers website

Case Studies: Organizations Contracting with School Districts

PUBLICLY FUNDED WORK OR CONTRACT WORK WITH SCHOOL DISTRICTS MAY LOOK DIFFERENT FROM LARGE GOVERNMENT FUNDED GRANTS.



Najla Gomez, Capacity Building Director from Californians for Justice shared important differences her organization has identified as a contracted partner with school districts across the state of California.

Rather than waiting for Requests for Proposals or expending energy searching for public funding opportunities, Californians for Justice found success in converting existing relationships with schools into contract work:

Our work was always about school transformation and advocacy in schools. We have had a presence in schools and a relationship with schools and districts on our advocacy side. And as we won things on the implementation side and [were] supporting them in their youth leadership, efforts, and we realized that the type of things that we were doing are things that they pay consultants to do. [...] And so **we approached them with a pitch. We did one-off trainings for them, so they could see what we're capable of**, and then charged them smaller amounts for those. And then they were like, "Okay, we see now what you're capable of - people really enjoy your trainings - let us enter into a bigger contractual relationship and agreement."

For organizations that are already working within districts or with schools and district communities it's often about presenting our services. [...] Districts are mandated to do a level of community engagement with youth, youth engagement programming - they already have to do all those things, and **often they are looking for contractors because they don't have the bandwidth or the capacity or the skill sets to do it in house**. So they're already looking. They're already paying people to do it. So **it's about letting them know who you are and what you're able to offer**.

Case Studies: Organizations Contracting with School Districts

Youth organizing often involves pushing back against policies, practices, and decisions made by people with greater institutional power. While opposition can be a part of organizing and advocacy work, conflict can increase when public dollars are also local dollars and youth campaigns run counter to the ideas of those holding the purse strings.



Organizations partnering with school districts may more frequently have to navigate this tension:



I think that's probably the biggest contradiction in this approach to navigate. It's something that you definitely as an organization want to talk about head on from the beginning: set some parameters, think through strategies, and know that it's probably gonna be a case-by-case basis. **The stronger your relationship is with the district, the more likely that you can do both the strong organizing and advocacy and hold a contractual relationship,** especially if they know who you are. If you're regularly having a presence at board meetings and the board knows who you are [and] what you do on the different sides of things.



We had more recently a fallout with [a school district] around our stance on [a political issue]. And that was really tough because it was again, it's our values and the things that we believe in, and then there was a lot of push on the district from outside forces to end a relationship with us. [...] **Like with any funding source, it's never guaranteed. So knowing and being prepared for if something does come to a head - we are going to stand in our values and not back down.** We need to be prepared for a contract to end. The more a strategy can be complementary of the things that you're demanding [...] the more it can be aligned, and that you can back it up to 'this is what the students are saying are the needs on the ground,' [...] the stronger it will be all around.

Case Studies: Organizations Working In Advocacy

LESSONS IN ADVOCACY: STOP AAPI HATE



Katie Moua (Director of Programs) and Nancy Xiong (Executive Director) with Hmong Innovating Politics, shared insights on Stop AAPI Hate and how advocacy efforts can help shape emerging public funding opportunities.

Youth organizations working in grassroots advocacy and centered within the communities they serve are uniquely positioned to have insight on the most pressing concerns and issues facing those communities, as well as the solutions. Through their work at the local level organizing for policy to address and prevent anti-Asian hate crime, HIP was able to strategize with partners to secure public funds for legislation grounded in community-based solutions.



Before the [Stop AAPI Hate] fund was released to the public [...] **in each region, we were already working with local partners to develop a resolution, and in those resolutions, to be very clear with the city on our work plans, and what positions we wanted the city to develop.** [For example] we wanted more resources and work being done around hate crime reporting and identifying what hate crime is.



Case Studies: Organizations Working In Advocacy

To ensure that legislation has the financial support needed for implementation requires like-minded people at the state level who can help shape what public funding could look like. Collaborating with other community-based organizations doing similar work in the region can help youth organizations track the development of state funding and support each other through the application process.



The funding for Stop the Hate naturally aligns with what we were already doing [...] we know all the same people who are implementing it, either consultants or folks that we worked with at the Sierra Health Foundation. Because we knew other organizations also doing similar work, **we all encouraged each other to apply.**



In Fresno we had created the Asian American Collaborative that was working on the resolution [...] The resolution passed, and then the opportunity to apply came out [...] **As a collaborative, we [knew] we also need funding to back it up because we know that we're going to need to do the work to hold the city accountable.**



Case Studies: Organizations Working In Advocacy

Youth organizations that have advocacy experience can help encourage other organizations to do so. There is power when organizations work together on a common goal, but it takes time to build trust in those relationships. It's important to focus on strengthening these ties so that coalitions persist past the current funding cycle and can continue to advocate for community-based solutions.



In Sacramento, our work started during pandemic [...] making sure our communities had access to vaccines. **The coalition was already there, but things began to look different.** A lot of Southeast Asian service organizations are direct service orgs. Now the work has to include organizing and advocacy. We really had to push internal partners that as well. Because a lot of partners receive state funding, there is a feeling of 'don't want to bite the hand that feeds you.' **Not organizing against, but [exerting] influence on, focusing in on what rapid response looks like. How do we get supports for victims?**



Trust building is really important for the first few years, because of the structure of funding and funders pitting us against each other. That has been a conversation. What happens when we receive public funding, [which] comes in strides, what happens when it stops? Also, **we have to remember that we were doing this work before we were being funded, need to trust [in ourselves] that we know what we are doing.**

Identifying Assets, Needs, and Next Steps

The following worksheets are available to help organizations think about their assets, needs, and next steps in areas that are crucial for pursuing public funds. We invite you to fill them out with other members of your organization after reading through the playbook. A printable version can be found [here](#).

External Knowledge, Relationships, and Resources

Areas that support organizations in pursuing public funding	What assets does your organization have in this area?	What needs does your organization have in this area?	What are next steps your organization can or would like to take?
Close relationships with private funders and peer organizations			
Relationships with elected and administrative officials or those connected to public funding sources			
Specialized support if internal knowledge and expertise cannot support the needs of the grant/contract			

Identifying Assets, Needs, and Next Steps

Internal Knowledge, Infrastructure, Systems, and Processes

Areas that support organizations in pursuing public funding	What assets does your organization have in this area?	What needs does your organization have in this area?	What are next steps your organization can or would like to take?
<p>Organization and program clarity, including a strong sense of your organization’s mission, vision, and values, and the work you are well-positioned to do</p>			
<p>Financial preparation, including audits on financials for orgs with 2M+ operating budgets, the ability to track costs/expenditures, a point person to manage finances, strong financial reserves, accounting systems that can support up to quarterly reporting, and awareness of insurance requirements</p>			
<p>Internal capacity, including point people/clear responsibilities for applications, data collection, and reporting, and strong processes for communication and collaboration</p>			
<p>Internal systems, including tools/ways to track programmatic data/metrics and impact, expenditures, and budgets by funding stream, and clear expectations around use/maintenance</p>			