PARTNERSHIP FOR THE BAY'S FUTURE

Policy Fund Grant Orientation Guide 2025-27

Table of Contents

Welcome to the Policy Fund 2025-27 Cohort **1**

The Policy Fund Teams **1**

Who's Who and Key Terms **3**

Resources for Policy Development and Implementation **4**

Participant Expectations **5**

Site Team Roles and Collaboration **7**

Government Partner 7

Community Partner 8

PBF Fellow 9

Policy Fund Site Teams and Focus Areas **10**

Communications and Messaging **11**

Conclusion **11**

Welcome to the Policy Fund 2025-27 Cohort!

We're thrilled to have you join the Partnership for the Bay's Future (PBF) as we work together to create a more equitable and inclusive Bay Area through innovative housing policies and community-centered approaches. Over the next two years, you'll collaborate with government partners, community organizations, and dedicated PBF Fellows to advance affordable housing production, preservation, and tenant protection initiatives.

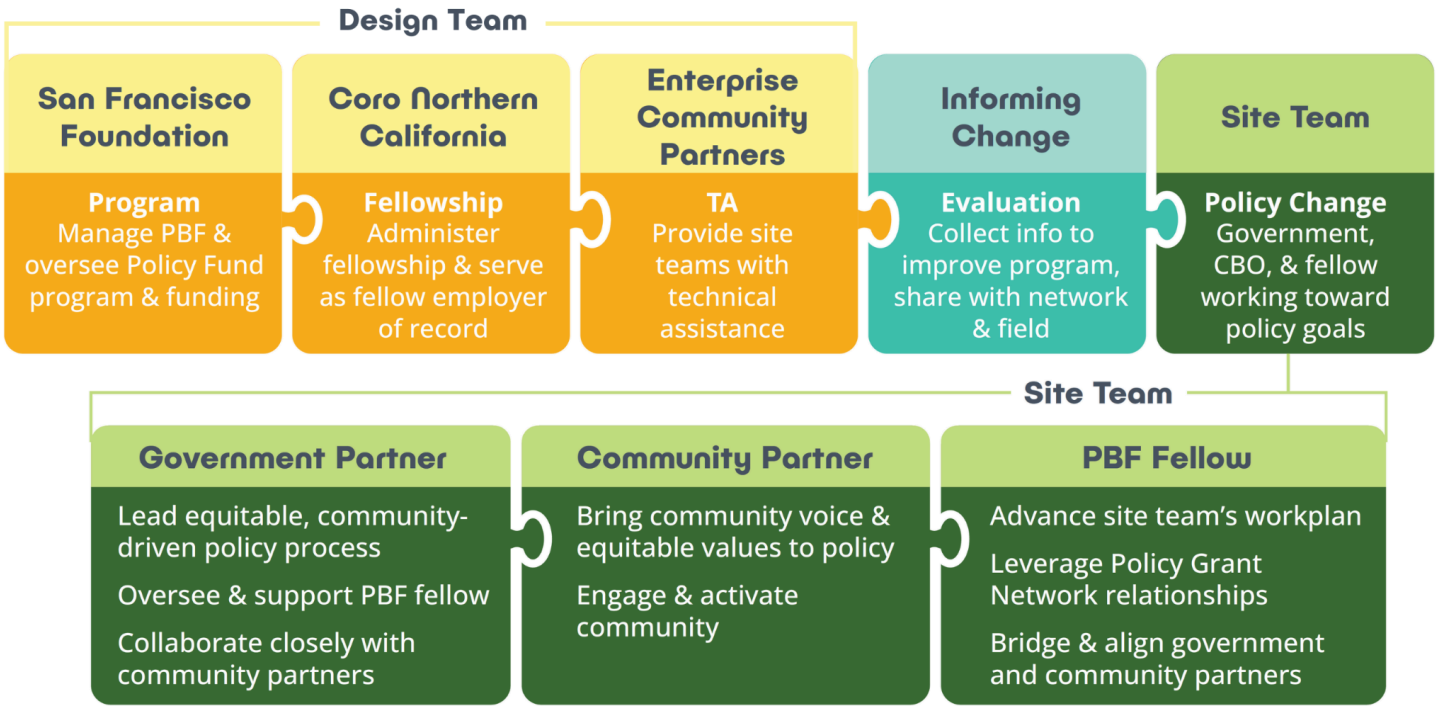
This orientation guide is your roadmap to the Policy Fund Program, detailing the resources, support, and opportunities available to you. From leadership development and technical assistance to grant funding and a vibrant network of collaborators, PBF equips you with the tools to make a lasting impact. Together, we'll tackle the housing challenges facing our region and help build vibrant, thriving communities for everyone.

Let's get started on this transformative journey!

The Policy Fund Teams

The Policy Fund operates within a collaborative framework that brings together key partners, each playing a vital role in ensuring the success of the program. This structure is

designed to promote community-centered and equitable policymaking, fostering strong partnerships and alignment across stakeholders. The diagram below illustrates how these teams work together and support your work.



The Policy Fund Network

The Policy Fund Network is made up of 10 site teams, each bringing together housing policy experts committed to advancing equitable policy change. These unique partnerships leverage relationships across government and community organizations to address housing challenges collaboratively.

The most successful site teams prioritize regular communications, maintain alignment through a shared workplan, and track milestones to stay on course. Use this network as a resource—connect with peers to share strategies, learn from their experience, and build collective knowledge.

If you encounter challenges in your work as a site team, don't hesitate to reach out to the Design Team for guidance. Together we can ensure your team achieves its goals.

The Design Team

The Design Team collectively works to ensure the success of the program, supporting site teams every step of the way. We will check in regularly with government and community partners to provide guidance, address challenges, and celebrate milestones.

If you need additional support or encounter issues, we encourage you to reach out proactively—your success is our priority. The Coro Program Director, Kaitlyn Quackenbush

(kquackenbush@coronorcal.org), will also request regular feedback from site teams, helping us learn and improve together.

These are the roles of the Design Team:

- **San Francisco Foundation (SFF):** SFF manages PBF, overseeing the Policy Fund, programming, grant funding, lobbying support, and communications. SFF facilitates staff transitions, shares organizational updates, and promotes collaboration through the Policy Fund network and Advisory Board. When in doubt, bring questions and comments to this team.
- **Coro Northern California:** As the Fellowship administrator and employer of record for the Fellows, Coro oversees the Fellow's professional and leadership development and guides the Fellows through the program in collaboration with their government site and community partners. Coro provides monthly training sessions and weekly one-on-one meetings to strengthen Fellows' skills and support their work. Additionally, Coro holds quarterly leadership development training to government and community partners and facilitates PBF Network Convenings to foster collaboration and shared learning across the Policy Fund network.
- **Enterprise Community Partners (Enterprise):** Enterprise is a national affordable housing nonprofit that exists to make a good home possible for the millions of families without one. Enterprise supports community development organizations on the ground, aggregate and invest capital for impact, and advance housing policy at every level of government. As the TA fund manager, Enterprise Northern California shares content expertise in housing policy, finance, and program design. They provide affordable housing resources, offering trainings for the Fellows, holding regular office hours to support teams, and connecting participants to subject matter experts for tailored guidance on specific challenges.

Who's Who and Key Terms

PBF brings together a diverse group of partners, each contributing to equitable policy change through unique roles and expertise. The table below provides an overview of the key roles, teams, and resources that make up PBF, helping you navigate and connect with the people and terms that are central to this work.

Partnership for the Bay's Future (PBF)	PBF is managed by the San Francisco Foundation and LISC Bay Area. SFF oversees the Policy Fund while LISC manages the Family of Loan Funds to facilitate loan programs for the production and preservation of affordable housing.
Policy Fund	The Policy Fund are two-year long grant programs that support government/community partnerships pursuing equitable policy initiatives related to affordable housing. The 2025-27 Policy Funds focus on production, preservation, and tenant protections.

Site team	The government partner, community partner(s), and fellow that make up an awarded Policy Fund team.
PBF Network	All site teams of the Policy Fund.
Design Team	Comprised of Coro, Enterprise, and the San Francisco Foundation, the Design Team coordinates Policy Fund programming.
PBF Fellow	A housing expert embedded with the government partner to drive policy creation and implementation. Fellows facilitate collaboration between community organizations, government entities, and other site teams, ensuring alignment and progress toward shared goals.
Government partners	Government entities participating in Policy Fund programs, leading policy initiatives while collaborating closely with community partners and the PBF Fellow to ensure policies are aligned with community needs.
Community partners	Community-based organizations partnering with government entities. They receive $220,000 in funding over two years to collaborate with PBF Fellows on community engagement, advocacy and lobbying efforts to advance policy initiatives.
Technical Assistance (TA) Fund	The TA fund provides $200,000 over two years for site teams to draw on for discrete projects, such as hiring a consultant for an economic development report or a PR firm for campaign materials.
PBF Alumni Network	The Alumni Network is comprised of former fellows, community and government partners.
Advisory Board	A cross-sector group of industry experts and leaders that advise on PBF priorities and inform regional strategy. The board is a resource to fellows and site teams.
Network Convenings	Quarterly convenings where the entire network shares their work, lessons learned, and fosters regional connection and strategy.
Leadership Training Sessions	Leadership training sessions offered by Coro for fellows, community, and government partners. All convenings and trainings are listed in the calendar.

Resources for Policy Development and Implementation

To support teams in achieving their policy goals, PBF provides a range of resources tailored to facilitate policy development and implementation. These include:

- **Dedicated Housing Policy Fellow**: Full-time housing fellows are placed at their host governments and advance the site team's shared work plan, and serve as a liaison between government and community partners.
- **Grant Funding:** Each site team receives $220,000 over two years ($110,000 per year) to support community partners, with the option to earmark a percentage for lobbying activities related to their team's policy proposals. Site teams with multiple

community partners must decide and document how funds will be divided, ideally memorializing the agreement in writing.

- **Technical Assistance (TA) Fund:** A $200,000 fund is available for the entire cohort over the two-year program. This fund supports hiring expert consultants for discrete projects such as messaging and communications support, data analysis, GIS mapping, and brownfield assessments.
- **Communications Support**: PBF offers communications assistance, including promoting events, publications and materials on its platforms, copy editing, and consulting on communications projects. Please read PBF's Communications Guide which outlines best practices and resources to help maximize your outreach efforts. For communications requests and questions, please contact Jordan Shapiro at jshapiro@sff.org.
- **Policy Advocacy Support:** Advocacy support is available as policies move through the legislative process, including letters of support and public comment. To request this assistance, please contact Ella Zimbalist at ezimbalist@sff.org with advanced notice and talking points when possible. For more information on lobbying, see the PBF lobbying policy.
- **Fellow Training and Development:** Fellows receive coaching, professional development, and training from Coro Northern California, and technical assistance from Enterprise Community Partners to strengthen leadership skills and housing policy expertise.
- **Cohort-Based Training:** Coro Northern California provides government and community partners training and support to strengthen leadership skills and foster regional connectivity. This includes quarterly meetings that bring together site teams to enhance collaboration and drive impact.
- **Policy Fund Network and Advisory Board Connections:** Site teams can connect through regular convenings of the Policy Fund network, which brings together all site teams to share knowledge and address sector challenges. Government and community partner staff will also convene regularly to build connections and address sector specific challenges. Additionally, you will have opportunities to engage with the PBF Advisory Board, a cross-sector group of housing experts offering valuable insights and guidance.

Please visit our Policy Fund Resources page for more details about these supports and how to access them.

Expectations for Policy Fund Network

PBF's expectations for successful participation are designed to help site teams get the most out of the Policy Fund. By meeting these expectations, participants contribute to a stronger, more collaborative network and more impactful outcomes for their communities.



Participate Fully	• Attend and contribute to quarterly network convenings and Coro Leadership Training sessions to strengthen regional connections and foster shared learnings among all PBF Policy Fund participants, whether virtual or in-person. All events and trainings are in the network calendar and calendar invitations will be issued by Coro.
	• Each site team is expected to host at least one network convening during the grant period, providing a meeting space for the cohort.
	• Make good-faith efforts to actively participate in regional communication strategies by sharing relevant case studies, learnings and updates from your policy and community engagement efforts.
	  ○ Fellows represent PBF at conferences, regional gatherings and similar events to highlight the program's impact and exchange knowledge.
	  ○ Fellows are also expected to write at least one blog post during their fellowship (more information on blog posts can be found in PBF's Communications Guide.
	  ○ While not required, site teams are encouraged to contribute case studies, reports, or other materials highlighting their work. More guidance on creating such contributions can be found in PBF's Communications Guide.
	  ○ Capture photos of your work, particularly those highlighting community engagement and collaboration. These images illustrate the real-world impact of your efforts and will likely be used in PBF communication efforts. Please send photos to Jordan Shapiro at jshapiro@sff.org.
	• Government and community partners will check in with the SFF at the end of each grant cycle to share updates on policy progress and renew the grant. This check in will serve as the grant report.

	• Be proactive about leveraging the resources available to you, such as network peer support, the Technical Assistance Fund, and communications coaching.
Embrace Partnership	• Collaboration is one of the founding principles of PBF. Success in your policy goals depends on strong, trusting relationships within your site team and across the Policy Fund network. Additionally, seek opportunities to collaborate with peers in the broader PBF community and SFF grantee network.
Set Your Team Up for Success	• The strongest teams have frequent touch points and regularly revisit their work plans. Each site team should establish a regular meeting cadence and collaborate on a shared work plan to stay aligned on goals and milestones. PBF Fellows play a central role advancing the site team's goals.
Share Timely Updates	• Share your milestones and challenges with SFF so we can support your efforts, troubleshoot, and amplify your successes to our community.
Contribute to Evaluation and Share Feedback	• Participate in program evaluation to support learning and improvement. PBF partners with Informing Change to develop success metrics, collect data, and evaluate progress through qualitative and quantitative methods. Site teams are expected to collaborate in this process and are encouraged to share feedback with SFF on what's working and areas for improvement.

Site Team Roles and Collaboration

Each member of the site team plays a vital role in achieving the team's shared policy goals. Beyond the expectations for the Policy Fund network, this section outlines specific responsibilities and recommendations to help each team member excel and work together effectively.

Government Partner

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

Engage Regularly with Fellow, Community Partner, and PBF Network

- Attend and contribute to quarterly network convenings to strengthen regional connections and foster shared learnings among all PBF Policy Fund participants, whether virtual or in-person.
- Attend and contribute to quarterly Government Partner Leadership Sessions to strengthen leadership skills, foster regional connectivity, and enhance collaboration and drive impact.

Oversee PBF Fellow

- Serve as the Fellow's onsite supervisor by providing guidance, feedback, and support in developing and achieving policy objectives. This includes but is not limited to orienting the Fellow to their new workspace, introducing them to key stakeholders, and holding them accountable for work hours, attendance, and deliverables. Regular direct and timely feedback should be shared with both the Fellow and the Coro Program Director.
- Be a good steward of the PBF Fellow from Janauary 2025- December 2026 by facilitating their relationships with key partners essential to achieving the policy objectives. These partners can be stakeholders both within and outside of government. In partnership with the Fellow, actively lead in engagement with community partners. Provide necessary resources, such as a functional workspace and necessary equipment, to facilitate their success.
- Ensure that Fellow's time is fully dedicated to advancing Policy Fund work, including participating in Fellow-specific programming. All work assigned to the Fellow must align with the objectives of the grant, maximizing their contribution to the team's shared goals.

Lead Equitable, Community-Driven Policy Process

- Collaborate closely with the community partner(s) and the Fellow to develop policy proposals and work plans to be advanced that align with shared goals and priorities.
- Establish a shared strategy for the Fellow's time with each community partner, documenting it in writing within the first 60 days.
- Activate and build civic and political will for the adoption and implementation of equitable tenant protection and affordable housing production and preservation policies by working collaboratively with the community partner(s) and Fellow.
- Provide content expertise in housing policy and governmental process and context to the community partners and Fellow.

Communicate with the PBF Team

- Provide regular feedback to the Coro Program Director about the Fellow and request support as needed. Complete bi-monthly feedback surveys, which are brief and designed to facilitate direct communication with the Fellow and proactively address any emerging issues.

- Check in with SFF every fall for conversation-based grant reports. These reports take the form of a conversation with SFF, with questions provided in advance. Alternatively, a written report may be submitted if preferred.
- Inform SFF and the Coro Program Director of any significant changes to the Policy Fund project proposed in the grant application, such as delayed timelines or shifts in policy priorities.
- Share any milestones, upcoming events, and media with SFF and the Coro Program Director.
- Participate fully in the evaluation process by sharing relevant learnings and case studies from the policy and community engagement processes, in order to facilitate collective learning with the regional cohorts and other jurisdictions within the Region. This entails collaborating with an evaluation partner, Informing Change.

Community Partner

Community partners are essential to ensuring the community's voice shapes the policy process. They support the Fellow by providing local context, fostering trust within the community, and contributing to policy development. Community partners also play a vital role in outreach and education for both local stakeholders and their government partners. The following are their key responsibilities:

Engage Regularly with Fellow, Government Partners, and PBF Network

- Each community-based organization should designate a staff member as the PBF point person. This individual will regularly engage with the Fellow to provide guidance, feedback, resources, and support. They are also expected to attend network convenings and community partner trainings, provide feedback and updates to the design team, and participate in evaluation efforts.
- Collaborate with the Fellow and government partner to design and advance policies that address the needs of populations most at risk for displacement.
- Collaborate closely with the government partner and Fellow to create and implement the Fellow's work plan.
- Maintain consistent communication with the Fellow and government partner through regular meetings to keep policy objectives on track and address challenges collaboratively.
- Attend and contribute to quarterly network convenings to strengthen regional connections and foster shared learnings among all PBF Policy Fund participants, whether virtual or in-person.
- Attend and contribute to quarterly Community Partner Leadership Sessions to strengthen leadership skills, foster regional connectivity, and enhance collaboration and drive impact.

Bring Community Voice and Equity Values to Policy

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

Engage and Activate the Community

- Engage, educate, and activate the community—particularly those historically excluded from the policy process—to build support for the site team's policy goals.

Communicate with the PBF Team

- Provide regular feedback to the Coro Program Director about the Fellow and request support as needed. Complete bi-monthly feedback surveys, which are brief and designed to facilitate direct communication with PBF Fellows and proactively address any emerging issues.
- Check in with SFF every fall for conversation-based grant reports. These sessions will include questions provided in advance, though a written report can be submitted as an alternative.
- Use frequent, informal check-ins to share key updates, troubleshoot issues, or provide important context to SFF and the Coro Program Director.
- Share any milestones, upcoming events and media opportunities with SFF and the Coro Program Director.
- Participate fully in the evaluation process by collaborating with Informing Change to share insights, learnings, and case studies from policy and community engagement processes, facilitating collective learning across the cohort and other jurisdictions across the region.

PBF Fellow

PBF Fellows are pivotal to advancing their site team's shared goals. Serving as the bridge between government and community partners, Fellows facilitate effective collaboration and alignment within their teams. They also support regional collaboration and Policy Fund network success by sharing resources and learnings with other Fellows and site teams. The following are key responsibilities:

Advance the Site Team's Work Plan

- Facilitate and champion the development, adoption, and implementation of their site team's policies through collaborative partnership with community and staff across their government's departments.
- Provide essential staff capacity to help government partners execute Policy Fund work plans effectively.

- Organize and lead regular meetings of site team partners to align on key decisions and advance policy objectives.
- Embed within the government department, adhering to departmental policies on work hours and email usage.

Bridge and Align Government and Community Partners

- Build and maintain strong relationships between government and community partners, ensuring effective and productive partnerships.
- Serve as institutional memory for the policy proposal and work plan, helping both partners maintain alignment in next steps and final goals.

Engage Fully in the PBF Fellow Cohort

- Attend Fellow-specific programming, including monthly Fellow meetings and regular one-on-one check-ins with the Coro Program Director.
- Proactively connect with Enterprise to address technical assistance needs and leverage available resources.
- Contribute learnings, networks, resources and tools that can support other cohort members in advancing their policy work plans.
- Serve as a liaison between their site team and Design Team. Examples include identifying technical assistance needs, submitting requests to the TA Fund, and contributing to communications efforts.
- Write at least one blog post during their two-year fellowship to share insights and amplify the impact of the work. Additional contributions are encouraged, as storytelling plays a vital role in advancing policy. More information on blog posts can be found in PBF's Communications Guide.

Engage with the Policy Fund Network

- Contribute to PBF activities, such as actively participating in the Policy Fund convenings, contributing communications content, and supporting evaluation efforts to strengthen the cohort's collective impact.
- Proactively connect with SFF and Coro to share important updates, address challenges, and request resources.
- Participate fully in the evaluation process by collaborating with Informing Change to share insights, learnings, and case studies from policy and community engagement processes, facilitating collective learning across the cohort and other jurisdictions across the region.

Policy Fund Site Teams and Focus Areas

The Policy Fund Network includes site teams from across the Bay Area, each working to advance equitable housing policies tailored to their communities. For a detailed overview

of the participating site teams, their focus areas, and partnerships, please refer to the Policy Fund Cohort 3 Matrix.

Communications and Messaging

All information regarding communications support, expectations, messaging, and branding is detailed in PBF's Communications Guide. This resource provides guidance on leveraging PBF's platforms, creating impactful content, and aligning with the program's messaging and branding standards. For additional support, please refer to the guide.

Conclusion

As a core member of the Policy Fund Network, your efforts are instrumental in advancing equitable housing solutions in the Bay Area. By collaborating with your site team, engaging with the network, and leveraging the expertise of PBF partners, you are contributing to a more inclusive and vibrant region.

We're excited to support you on this transformative journey and look forward to celebrating your successes along the way. If you have any questions or need assistance, don't hesitate to reach out to the PBF team. Together, we can make a lasting impact.