



GOVERNOR'S OFFICE OF BUSINESS AND ECONOMIC DEVELOPMENT
STATE OF CALIFORNIA • OFFICE OF GOVERNOR GAVIN NEWSOM

CALIFORNIA COMMUNITY REINVESTMENT GRANTS PROGRAM

Fiscal Year 2018–19 Grant Solicitation

April 2019

Table of Contents

GUIDANCE AND OVERVIEW	1
Background	1
Program Priorities.....	2
Timeline.....	3
Funding	3
Eligible Applicants	3
Collaborative Applications	4
ELIGIBILITY CRITERIA	5
Geographic Eligibility	5
Eligible Services	5
Job Placement	5
Mental Health Treatment.....	6
Substance Use Disorder Treatment.....	7
System Navigation Services	8
Legal Services to Address Barriers to Reentry	8
Linkages to Medical Care	8
Eligible Costs.....	9
Indirect Cost Rate.....	9
Ineligible Costs	9
APPLICATION REQUIREMENTS.....	11
Application Components.....	11
Create Application.....	11
Applicant Information	11
Contact Information.....	11
Proposal Summary	11
Collaborative Application Partners	11
Organizational Capacity	11
Priority Populations and Community	11
Proposal Description, Implementation, and Goals	12
Evaluation Plan	12
Budget	12
Form 990, Exempt Organization Tax Return Information.....	12

Required Documents/Supporting Documents	12
Application Evaluation	13
Application Review Process	13
Scoring Criteria.....	13
Preference Points	13
Notice to Applicants.....	14
Verification of Applicant Information	14
Program Administration.....	15
Advance Payments.....	15
Reimbursement Requests	15
Reporting Requirements.....	15
Site Visits/ Meetings	15
SCORING CRITERIA.....	17
Section I: Organizational Capacity	17
Section II: Priority Populations and Community	19
Section III: Proposal Description, Implementation, and Goals	21
Section IV: Evaluation Plan.....	24
Section V: Budget	25

GUIDANCE AND OVERVIEW

This resource document provides applicants with information regarding the California Community Reinvestment Grants Program (CalCRG) and instructions to access and complete the CalCRG program application. For more information regarding the CalCRG program, please visit www.business.ca.gov/CalCRG. If you have additional questions after reading the grant solicitation, please contact the CalCRG team by emailing CalCRG@gobiz.ca.gov or calling (916) 322-2683.

Background

The Governor's Office of Business and Economic Development (GO-Biz) serves as the State of California's leader for job growth and economic development efforts. GO-Biz offers a range of services to business owners including: attraction, retention and expansion services, site selection, permit assistance, regulation guidance, small business assistance, international trade development, assistance with state government, and much more.

The CalCRG program was included in the Adult Use of Marijuana Act (Proposition 64), which was approved by California voters on November 8, 2016. In accordance with the proposition, GO-Biz will award grants beginning no later than January 1, 2020, to local health departments and at least 50 percent to qualified community-based nonprofit organizations to support job placement, mental health treatment, substance use disorder treatment, system navigation services, legal services to address barriers to reentry, and linkages to medical care for communities disproportionately affected by past federal and state drug policies, also known as the War on Drugs (WoD).

The historical and current context around the WoD is critical to understanding the impact GO-Biz and the CalCRG program aspires to achieve. The WoD has disproportionately impacted communities of color, particularly low income African-American/Black and Latino/Hispanic communities. For example, even though African American/Black, Latino/Hispanic, and White persons use and sell marijuana at similar rates, African American/Black and Latino/Hispanic individuals have historically been arrested more frequently for marijuana violations¹²³. Harsh federal and state drug policies enacted during the WoD led to the mass incarceration of people of color, decreased access to social services, loss of educational attainment due to diminished federal financial aid eligibility, prohibitions on the use of public housing and other public assistance, and the separation of families. The CalCRG program aims to be a resource to address and repair the multi-generational impacts of the WoD.

While the effects of the WoD are well documented and visible in communities across the state, the CalCRG program also recognizes that populations living in impacted neighborhoods bring many assets, collaboratives, and excellent program and service providers making positive change. The CalCRG program hopes to invest in these community resources to mitigate and, where possible, overcome the presence of systemic restrictions and barriers to opportunities and resources. GO-Biz encourages applications from organizations that are bringing healing and economic empowerment to individuals, families, and communities that have been disproportionately impacted by past federal and state drug policies.

¹ Bureau of Criminal Statistics, California Department of Justice, "Crime in California 2010," (2011).

² Substance Abuse and Mental Health Services Administration, "Results from the 2014 National Survey on Drug Use and Health," (2015), Tables 1.24A and 1.24B.

³ University of California Los Angeles, California Health Interview Survey, 2011-2012.

Program Priorities

The CalCRG program, like any new state program, will evolve and look different over time. This is particularly relevant for the CalCRG program because GO-Biz anticipates funding increasing by \$10 million each year between 2018 and 2022, at which time the expected disbursement will be \$50 million each year thereafter.

Current CalCRG program priorities include proposals from organizations led by individuals directly impacted by the WoD, organizations that serve individuals formerly incarcerated in prison, organizations placing individuals in jobs, organizations implementing trauma-informed care, and collaborative applications demonstrating a whole person care approach. Preference points will be allocated to proposals that match current CalCRG program priorities. These funding priorities may change in future years as staff assess this inaugural funding cycle and receive continued input from stakeholders. CalCRG staff are resolved to ground the program in science and data, while being receptive to emerging and innovative approaches and to remain responsive and accountable to stakeholders and taxpayers. Although the funding amounts and program priorities will likely change in subsequent years, our mission, guiding principles, and program goals will provide a strong foundation for the program to grow and evolve.

OUR MISSION

The CalCRG program advances health, wellness, and economic justice for populations and communities harmed by the WoD.

OUR GUIDING PRINCIPLES

1. Responsive to and focused on populations and communities disproportionately impacted by the WoD.
2. Grounded in science and data, while being receptive to emerging and innovative approaches.
3. Advancing whole person, trauma-informed approaches.
4. Accountable to taxpayers and stakeholders.

GOALS

1. Identify and invest in high-impact approaches to serve communities affected by the WoD.
2. Engage stakeholders and develop meaningful relationships with and provide excellent support to grantees.
3. Build awareness about the program and its impacts.
4. Optimize program administration and ensure the grant application, invoicing, and reporting processes are user-friendly.

Timeline

Date	Activity and Detail
April 22, 2019	Grant Solicitation Release The final Grant Solicitation Notice will be released on this date and the online application will be available at www.business.ca.gov/CalCRG .
April 30, 2019	Technical Assistance Session A technical assistance webinar to assist applicants with questions about the application process and program requirements will be held on April 30, 2019, from 1:30–3:00. Interested parties can register for the webinar here .
May 16, 2019	Application Due Date Applications must be submitted no later than 11:59 pm on May 16, 2019.
May 17, 2019–July 31, 2019*	Grant Evaluation and Awards GO-Biz will evaluate applications and award grants during this period.
August 1, 2019–July 31, 2021*	Grant Term All grant funds must be expended during the grant term.

*Subject to change depending on volume of applications received.

Funding

A total of \$9,600,000 is available for fiscal year (FY) 2018–19. Applications are subject to a minimum request of \$50,000 and a maximum request of \$300,000 for applications from a single organization. For collaborative applications, the minimum request is \$100,000 and the maximum request is \$650,000, with the maximum allocation of \$350,000 for any one organization in the collaboration. An applicant may submit one standalone application and may be a participant as part of a collaborative application but may not receive more than \$350,000 total between the two applications. Funds may only be used for eligible activities and costs. The amount awarded may be spent over the two-year grant term. Grant funds may be expended only during the grant term. Funds expended before or after the grant term will not be eligible for reimbursement.

Eligible Applicants

- Local Health Departments (LHDs) –defined as any of the 61 California-identified local health departments with a legally appointed Health Officer.
- Community-based Nonprofit Organizations (CBOs) – defined as organizations established and focused on issues and concerns at the community level (neighborhood, city, county, region) that are representative of the populations⁴ or significant segments of the populations they provide services to in that community. They are often organized around a particular purpose or cause and tend to be grassroots in nature, working from the ground-level upward to create positive change and equity. Any CBO that applies for CalCRG program funds must:
 - Have been duly organized, in existence, and in good standing for at least six months prior to the date the Grant Solicitation Notice is issued by GO-Biz;

⁴ For purposes of the CalCRG program, the term “populations” refers to groups of individuals from diverse backgrounds, and/or other attributes, such as but not limited to: race, ethnicity, religious beliefs, justice system involvement, immigration status, and economic status.

- Be registered with the California Secretary of State's Office;
- Be a tax-exempt⁵ organization;
- Be in compliance with requirements of the California Attorney General's Registry of Charitable Trusts, if applicable;
- Have any other state or local licenses or certifications necessary to provide the services requested (e.g., facility licensing by the Department of Health Care Services, etc.), if applicable; and
- Have a physical address in California.

Collaborative Applications

Organizations may partner for a collaborative application in which two or more Eligible Applicants partner to deliver coordinated programs and services. A Lead Applicant must be designated to act on behalf of all participating entities. The Lead Applicant is the applicant/grantee who will be responsible for writing the majority of the grant application, fiscal accountability, and the performance of the grant, including all required documentation and reporting requirements. GO-Biz will direct all official correspondence and grant payments to the Lead Applicant. All participating entities will be subgrantees and must have costs associated in the Budget. It will be the Lead Applicant's responsibility to direct payments to the participating entities within the collaboration. All participating entities, including the Lead Applicant, must be an Eligible Applicant as defined above and be identified at the time of application submittal. A collaborative application may request a maximum of \$650,000 with no more than \$350,000 allocated to any one organization.

⁵ For purposes of the CalCRG program, "tax-exempt" means an organization exempt from taxation under provisions of both the Internal Revenue Code and the California Revenue and Taxation Code.

ELIGIBILITY CRITERIA

Geographic Eligibility

The CalCRG program statute requires programs and services to be provided to communities disproportionately impacted by past federal and state drug policies. In accordance with this requirement, the CalCRG program has developed the following criteria:

Services proposed by an applicant must be for communities within ANY of the following geography:

- A county within California with a per capita drug related arrest rate higher than the state's per capita drug related arrest rate. Based on data publicly available from the California Department of Justice (1980-2016), the following counties meet this requirement:

Alameda, Alpine, Contra Costa, Del Norte, Fresno, Glenn, Humboldt, Imperial, Inyo, Kern, Lake, Los Angeles, Mendocino, Merced, Riverside, Sacramento, Santa Cruz, San Bernardino, San Diego, San Francisco, San Joaquin, Sierra, Solano, Stanislaus, Tehama, Trinity, Tulare, Yolo and Yuba.

- Census tracts that are among the highest (top 25%) civilian unemployment and poverty in the state (based on the 2013-2017 American Community Survey). Note: these census tracts coincide with the census tracts that will be effective on January 1, 2020, for California's New Employment Tax Credit.
- Census tracts that are among the highest (top 25%) 1-parent or nonfamily households in this state (based on the 2013-2017 American Community Survey).
- Census tracts that are among the lowest (bottom 25%) educational attainment (non-high school graduates) in this state (based on the 2013-2017 American Community Survey).
- Census tracts that have been designated in California as an Opportunity Zone⁶.

For the census tract criteria referenced above, applicants can use the CalCRG interactive online mapping tool located at <http://maps.gis.ca.gov/calcr/g/map.html> to identify whether the community they are proposing services to is within the above referenced census tract geography.

In addition to these geographic eligibility requirements, applicants will be asked to describe in their application how the community they are serving has been disproportionately impacted by past federal and state drug policies.

Eligible Services

Proposed services must fall within one or more of the funding categories below:

Job Placement⁷

Services are geared towards placing clients in long term jobs⁸ that lead to economic self-sufficiency and beyond. All eligible services must include purposeful and meaningful involvement in placing clients in a job. Jobs that offer various possible career pathways, opportunities for upward mobility, and work benefits like access to healthcare are preferable.

⁶ More information on Opportunity Zones can be found [here](#).

⁷ Job placement in the cannabis industry is allowed but not required.

⁸ Long-term employment refers to jobs of at least twelve months in duration.

Activities in connection with placing clients in a job are allowable, however, job placement must be the outcome of the proposed services.

Eligible services include:

- Assessments
 - Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
 - Comprehensive and specialized assessments of the skill levels and service needs of clients, which may include:
 - Diagnostic testing and use of other assessment tools.
 - In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.
- Planning
 - Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for clients to achieve their employment goals, including the list of, and information about, eligible training providers.
 - Career planning.
- Training
 - Short-term pre-vocational services including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, financial literacy skills, and professional conduct services to prepare individuals for employment.
 - Workforce preparation, readiness, and skills development.
 - Paid internships and work experiences that are linked to careers.
 - English language acquisition and integrated education and training programs.
- Navigation
 - Job search assistance.
 - Resume and application development.
 - Salary negotiation assistance.

Ineligible services include:

- Placement of individuals in jobs in which the compensation is not required to be reported on IRS Form W-2.

Mental Health Treatment

Services geared towards helping clients achieve mental wellbeing through either clinical or non-traditional means.

Eligible services include:

- Psychotherapy: the therapeutic treatment of mental illness provided by a trained mental health professional. Psychotherapy explores thoughts, feelings, and behaviors, and seeks to improve an individual's well-being. Examples include Cognitive Behavioral Therapy, Exposure Therapy, Dialectical Behavior Therapy, etc.
- Case management: coordinates services for an individual with the help of a case manager. A case manager can help assess, plan, and implement a number of strategies to facilitate recovery.

- Support groups and healing circles: a group meeting where members guide each other towards the shared goal of recovery. Support groups often include peers that have suffered from similar experiences.
- Complementary and Alternative Medicine (CAM): refers to treatment and practices that are not typically associated with standard care. CAM may be used in place of or addition to standard health practices (e.g. supplements, meditation, acupuncture, etc.).
- Arts and creative therapies: using the arts (music, painting, dance or drama) to help a client express and understand themselves in a therapeutic environment, with a trained therapist.
- Outpatient mental health treatment.
- Empowerment activities.
 - Empowerment activities may include but are not limited to individuals with mental health disorders/illnesses organizing and promoting regular positive community activities and raising awareness of mental health issues through forums and conferences.

Ineligible services include:

- Preventative care (e.g. care or services prior to or absent symptoms or a diagnosis identified by a mental health professional or other subject matter expert).

Substance Use Disorder Treatment

Services geared towards helping clients recover from substance use disorder through clinical or non-traditional means.

Eligible services include:

- Individual and group counseling may use the following areas for treatment:
 - Cognitive-behavioral therapy. For instance, cognitive-behavioral therapy might help a person be aware of the stressors, situations, and feelings that lead to substance use so that the person can avoid them or act differently when they occur.
 - Contingency management is designed to provide incentives to reinforce positive behaviors, such as remaining abstinent from substance use.
 - Motivational enhancement therapy helps people with substance use disorders to build motivation and commit to specific plans to engage in treatment and seek recovery. It is often used early in the process to engage people in treatment.
 - Multi-step facilitation therapy seeks to guide and support engagement in programs such as Alcoholics Anonymous or Narcotics Anonymous.
- Short term treatment that focuses on detoxification (medically managed withdrawal), initial intensive treatment, and preparation for a return to a community-based setting
- Medication Assisted Treatment (MAT).
- Recovery support services: non-clinical services that are used with treatment to support individuals in their recovery goals. Often provided by peers or others already in recovery.
- Community awareness and education efforts specific to substance use disorder treatment.

Ineligible services include:

- Preventative care (e.g. care or services prior to or absent symptoms or a diagnosis identified by a substance use disorder treatment professional or other subject matter expert).

System Navigation Services

Services are geared towards helping clients and communities navigate, have access to and/or improve systems based on client and/or community needs to advance their economic, physical, and emotional wellbeing.

Eligible services include:

- Resource identification and referral for case management.
- Support completing actions useful for reentering society (e.g. opening bank accounts, obtaining driver's license, finding and qualifying for subsidized housing, immigration services, enrolling in a school or college, etc.).
- Support completing actions useful for building economic security (e.g. providing business development skills and investor pitch training, forming community owned social enterprises, etc.).
- Aiding populations to understand and use available entitlement benefits.
- Tax filing support for low income families.
- Financial literacy and advice for achieving financial stability (e.g. understanding credit scores, paying off debt, etc.).

Ineligible services include:

- Services with no clear indication of its potential to significantly advance clients' economic, physical, and emotional wellbeing.
- Linkages to services that are merely recreational in nature.

Legal Services to Address Barriers to Reentry

Services are geared towards helping clients reenter society after incarceration in jail or prison.

Eligible services include those related to:

- Record analysis or background check services to find errors or incomplete information in criminal records.
- Expungement, sealing a criminal record, or other post-conviction relief available under the Penal Code or other provisions of law.
- Employment or licensing barriers based on a criminal record.
- Obtaining or regaining a valid driver's license or identification card.
- Denial of housing applications⁹.
- Criminal justice debt.
- Immigration services to address barriers to reentry.
- Community awareness and education efforts specific to addressing legal barriers to reentry.

Ineligible services include:

- Legal services that do not serve formerly incarcerated populations and/or do not address barriers to reentry.

Linkages to Medical Care

Services are geared towards helping clients secure medical services.

Eligible services include:

⁹ Family members may be included in this service if denial is due to the record of a formerly incarcerated individual

- Linking people directly to medical services.
 - Referrals
 - Transportation to medical appointments
- Linking health care providers, community organizations and public health agencies to improve patients' access to preventative and medical care services.
 - These approaches can include forming partnerships, coordinating activities to fill gaps in needed services across systems and promoting patient and community involvement.
 - Types of clinical-community linkages include coordinating medical care and other community services at a single location and developing ways to connect patients to resources more effectively¹⁰.

Ineligible services include:

- Directly providing medical care to individuals.
- Subsidizing clients' medical costs or providing free medication.
- Linking individuals with non-medical services.

Eligible Costs

To determine if a cost is allowable, the cost must meet the following criteria:

- Be necessary and reasonable for proper and efficient administration of the proposed services.
- Be authorized and not prohibited under state laws, regulations, or CalCRG program requirements.
- Be adequately documented.

Indirect Cost Rate

Indirect costs may not exceed 17 percent of the total grant awarded. An indirect rate breakdown of costs will be required and will be evaluated. Indirect costs are expenditures not capable of being assigned or not readily itemized to the proposed services but considered necessary for the operation of the organization and the performance of the proposed services. The costs of operating and maintaining facilities, accounting services, administrative salaries (management not directly working on the proposed services), insurance, roadside assistance, background checks, utilities, telephone bills, internet bills, legal fees, and other on-going expenses not otherwise counted anywhere else and are generally prorated (i.e., shared among other programs operated by the grantee) are examples of indirect costs. All indirect costs charged to the grant must be associated with grant activities as shown in the approved Budget.

Ineligible Costs

The following costs are ineligible under the CalCRG program:

- Lobbying – Recipients of this grant are not allowed to use funds to lobby federal, state, or local officials or their staff.
- Bonuses/Commissions – Funds awarded by this grant are not allowed to fund special bonuses and/or commissions, or any other related payments.
- Supplanting – Grants through the CalCRG program may not be used to support program activities that are already funded through a different source. The use of funds awarded in

¹⁰ Let's Get Healthy California, "Clinical-Community Linkages" <https://letsgethealthy.ca.gov/clinical-community-linkages/>

this grant are not allowed to be used in the place of program costs for existing local, state, or federal funded projects or services.

- Purchase of land or buildings.
- Other items that are banned by the State of California or GO-Biz deems inappropriate or inconsistent with statutory or programmatic requirements of the CalCRG program.

GO-Biz reserves the ability to modify applicant budgets if included costs are deemed ineligible.

APPLICATION REQUIREMENTS

Application Components

The link to the online application portal and a detailed Application Guide are available at www.business.ca.gov/CalCRG. The application consists of the following sections which must be completed to submit the application:

Create Application

To create a new application, enter the organization's legal name and organization type. For a Collaborative Application, enter the Lead Applicant's name, organization type, and the total number of partners in the collaboration.

Applicant Information

Enter the organization's business information, mailing and payment addresses, and indicate its basis for geographic eligibility [county or census tract(s)].

Contact Information

Enter the contact information for the applicant or employee of the applicant that is most familiar with the applicant's proposed services. Include the contact information for the person that is designated as the primary contact person that is authorized to communicate with GO-Biz on behalf of the applicant. There should be at least one contact person's information added for each organization in a collaborative application. Contacts added in this section are only used for communication purposes; this does not grant the contact access to the online application. To authorize a contact access to the online application, click on "Options" at the bottom of the Application Summary screen and then click on "Application Users". Please note that all new application users must create their own account prior to this action.

Proposal Summary

In this section, the applicant will identify the funding category or categories for its grant application, the amount of funding requested, and provide an executive summary of its proposal.

Collaborative Application Partners (only applicable to Collaborative Applications)

In this section, the applicant will list all organizations who are a part of the Collaborative Application (excluding the Lead Applicant, as their information is entered in the "Applicant Information" section). Include the partner organization's legal name, organization type, dollar amount budgeted for, mark all service categories that the partner will provide, and answer the narrative questions. If the organization is a CBO, enter the required business information, as well.

Organizational Capacity

This section is to collect information on the organization's history and background, as well as describe the intended services to the priority population(s) for this grant. This section includes process questions and financial questions.

Priority Populations and Community

In this section, include the problem statement or problem description (i.e. the problem the proposed services intend to address). This section should demonstrate the need and demand for services in the population your organization is proposing to serve.

Proposal Description, Implementation, and Goals

In this section, describe the proposed service details and intended implementation; work plan and timeline; goals, and expected outputs and outcomes of the proposed services.

Evaluation Plan

In this section, provide details of how you will evaluate the effectiveness of the proposed services and describe the organization's improvement procedures and sustainability of the proposed services.

Budget

In this section, include the proposed budget amounts and descriptions for Direct and Indirect Costs associated with the proposed services. Budget categories include Personnel, Employee Training, Equipment & Materials, Other Direct Costs, and Indirect Costs. The Indirect Costs must be no greater than 17% of the total grant amount requested. Upload the Budget Spreadsheet and any supporting documentation in the Required/Supporting Document section of the online application (see below).

Form 990, Exempt Organization Tax Return Information (only applicable to CBOs)

Applicants should indicate if they have ever filed a Form 990, the tax year of the most recently filed Form 990, and all corresponding dollar amounts requested.

Required Documents/Supporting Documents

All applicants must upload the following required documents:

- CalCRG Budget spreadsheet (available at www.business.ca.gov/CalCRG)
- CalCRG Work Plan/Timeline (available at www.business.ca.gov/CalCRG)
- Organizational Chart
- Biographies/Resumes:
 - For LHDs: include staff who will be directly working on the proposed services (e.g. Program Director, Program Manager, Program Specialist, fiscal analyst, etc.)
 - For CBOs: include the organization's Executive Director and key staff directly working on the proposed services, and if desired, Board members, decision makers, and/or other staff
- Mostly recently filed IRS Form 990 (required for CBOs only)

The following documents are optional for both LHDs and CBOs:

- Letters of support
- Evidence of need/demand for the proposed services
- Other – any other supporting documentation relevant to your application

APPLICATION EVALUATION

Application Review Process

GO-Biz will utilize the following application review process:

1. Technical review – applications will be verified for completeness and eligibility
2. Disqualifications – GO-Biz reserves the right to disqualify applicants or deny applications for the following reasons:
 - Incomplete applications
 - Ineligible applicant
 - Ineligible service/geographic area
 - Ineligible services
 - Proposal deemed inconsistent with the statutory or programmatic requirements of the CalCRG program
3. Scoring/evaluation – the Scoring Criteria will be the primary tool for determining awards however, the following may be taken into consideration for evaluating proposals and recommending awards:
 - Site visits during the application evaluation period
 - Geographic diversity of the potential grantees
 - Advancement of the overall mission and objectives of the CalCRG program

Scoring Criteria

The Scoring Criteria document is a detailed layout of the scored grant application sections. It includes maximum possible points, the intent of the section, the application questions, rating factors for scoring, and the scoring point scale. It also includes more detail on preference points for a section, if applicable. It is highly recommended that the scoring criteria document is referred to when writing the grant application. Below is a summary of the total points possible.

Categories	Base Points	Preference Points	Total
Organizational Capacity	10	5	15
Priority Populations and Community	35	10	45
Proposal Description, Implementation, and Goals	35	5	40
Evaluation Plan	10	N/A	10
Budget	10	N/A	10
Collaboration	N/A	5	5
Total	100	25	125

Preference Points

Preference points may be given to qualified applicants in the following categories:

- Organizational Capacity
 - An applicant may receive up to 5 preference points based on the extent by which the applicant can demonstrate that its board members, decision makers, and/or staff have been directly impacted by the WoD.
 - Evidence to meet this criterion may include (but not limited to): letters of support, resumes, biographies, organizational charts, etc.
- Priority Populations and Community
 - An applicant may receive up to 5 preference points if at least 40% of its clients have been formerly incarcerated in prison.

- An applicant may receive up to 10 preference points if at least 75% of its clients have been formerly incarcerated in prison.
- This claim must be supported by documentation that may include but is not limited to intake records, past reports to funders, client statistics, etc.
- Proposal Description, Implementation, and Goals
 - An applicant may receive up to 2.5 points if they can meaningfully show that job placement is a priority and focus of the proposed services through the narrative and budget (monetarily).
 - An applicant may receive up to 2.5 points if they can meaningfully demonstrate trauma-informed care implementation through organizational policies, procedures, and/or training records.
- Collaboration
 - Collaborative applications that meaningfully show a whole-person care approach to address the full spectrum of client needs – medical, behavioral, socioeconomic, and beyond – may receive up to 5 preference points.

Notice to Applicants

All materials submitted in response to a CalCRG program grant solicitation will become the property of GO-Biz and as such, are subject to the California Public Records Act (Gov. Code, § 6250, et seq.). However, a number of exemptions and prohibitions exist under both federal and state law that would prevent disclosure of certain documents, including tax, proprietary, confidential, privileged, financial, and/or trade secret information.

Verification of Applicant Information

By submitting an application, applicants authorize GO-Biz to verify any and all information submitted in the application, including, but not limited to, verification of prior experience, public records (i.e. CA Franchise Tax Board, CA Secretary of State, and/or Attorney General's office) and other information necessary to evaluate the application. GO-Biz may request additional documentation to clarify or validate any information provided in the application and/or budget. In addition, GO-Biz may request to conduct a site visit during the application evaluation period to substantiate claims made in the application.

PROGRAM ADMINISTRATION

Advance Payments

Up to 20% of the total grant may be provided as an advance upon execution of the grant agreement based on a needs assessment. Costs must still be tracked and reconciled. The percentage provided as an advance will have the same percentage offset from future invoice totals.

For example, a \$100,000 grant is awarded with \$20,000 provided as an advance payment. A future invoice/request for reimbursement of \$10,000 would have \$2,000 offset and applied towards recovery of the advance payment and the grantee would receive a reimbursement of \$8,000 for that invoice.

Reimbursement Requests

Grantees may request reimbursement no more than once per month. Eligible costs must be associated with the approved budget and will be authorized for reimbursement upon the CalCRG program grant manager's approval of the reimbursement request. Reimbursement requests must include itemized documentation of claimed expenses (e.g., personnel expenditure itemization, itemized receipts, and/or proof of payment of invoices) as well as the CalCRG reimbursement request template, which will be provided at a later date.

Reporting Requirements

Grantees shall submit quarterly progress reports to the CalCRG program grant manager to determine if the grantee is adequately progressing in accordance with the terms and conditions of the grant agreement, provide interim findings, and afford occasions for airing difficulties or special problems encountered so that CalCRG team may better assist grantees in finding solutions to such problems. Progress reports are also an opportunity for grantees to highlight their successes and accomplishments.

The quarterly progress report shall include all activities, training, program implementation, evaluation efforts, and must adhere to the GO-Biz report template, which will be released at a later date. Grantees are to use the following procedures for the preparation and submission of a progress report:

- Progress reports must be submitted in the format required by the CalCRG program and should address all related topics.
- The report should describe the overall progress, including results to date, a comparison of the actual progress with the proposed goals for the period, any current problems or favorable or unusual developments, and the work to be performed during the succeeding period.
- The report shall include all supporting documents that reflect the completion of activities outlined in the work plan approved by CalCRG program staff.

Grantees will also be required to submit a final report at the end of the grant period.

Site Visits/ Meetings

Site visits are a key function of support and partnership during the grant period, allowing GO-Biz to provide additional resources and technical assistance to support all grantees in an efficient and effective manner. The CalCRG program's grants will require scope reviews and site visits to ensure the consistency of performance on objectives, terms, and conditions established by the grant to ensure good stewardship of taxpayer dollars. CalCRG program grant managers will

be responsible for scheduling and conducting the site visit as well as providing an insightful post-visit summary.

Site visits may occur for various reasons, including but not limited to:

- Providing technical assistance and capacity building for grantees.
- Verifying that grantees are meeting programmatic, administrative, and fiscal requirements.
- Verifying that grantees are consistent with the approved CalCRG program work plan.
- Identifying opportunities for improvement.
- Gain perspective on grantees challenges and successes.

Scoring Criteria

The scoring criteria table below lists and defines the rating factors for which each proposal will be scored. The applicant’s proposal will be evaluated in accordance with the prescribed rating factors listed in each section of the table. An applicant’s point scores will be based on how well their proposal addresses the items listed under each rating factor within the corresponding application section.

In addition to the preference points listed in the table below, collaborative applications may receive up to 5 preference points for a total of 25 preference points. Please see the [Preference Points](#) section of the Overview and Guidance section of this document for more information.

Total points possible: 100 plus up to 25 preference points

Section I: Organizational Capacity	
Maximum Points Possible	10
Intent	<p>Ascertain and/or understand:</p> <ul style="list-style-type: none"> • Individuals responsible for how the grant funds will be utilized • The ability of the applicant to deliver the proposed services and comply with the grant agreement • If and how the applicant’s leadership reflects communities disproportionately impacted by the War on Drugs (WoD) • The applicant’s ability to steward the funds to achieve positive impact
<p>Questions</p> <p>(Note: Questions 1-4 will also be asked of each organization in a collaborative application)</p>	<ol style="list-style-type: none"> 1. What is your organization’s mission? 2. Describe your organization’s core competencies (i.e. what does your organization do well). 3. List board members and staff that will be working on the proposed services, a description of their background, and their roles and responsibilities. Please include a description of if and how the organization’s board members, decision makers, and/or staff have been directly impacted by the WoD. (<i>See preference point section</i>) 4. Describe your organization’s experience providing services in your community/service area, and how those relate to the proposed services in your grant application. 5. Current process questions <ol style="list-style-type: none"> a) Do you refer clients to outside organizations? If yes, please describe your policies, process, and approach to doing so. b) Do you have a culture of communicating with referral organizations about clients? If yes, please describe. c) Describe your follow-up and engagement with clients during, and if applicable, after working with them. 6. Financial questions <ol style="list-style-type: none"> a) Please provide a short financial history of your organization, including sources of funding and debt. b) What is your organization’s past federal and/or state grant experience?

	<p>c) Provide a summary of the last three financial agreements (loans, grants, incentive programs, etc.) your organization has entered into. Please include a description of your programmatic compliance and completion of deliverables.</p>
<p>Rating Factors</p>	<p>Scores in this category are based on the applicant’s ability to demonstrate that:</p> <ul style="list-style-type: none"> • It is well-suited and experienced in providing the proposed programs and/or services • It can comply with statutory and programmatic requirements and effectively implement grant requirements. • It is financially stable and can provide a history of fiscal integrity.
<p>Point Scale</p>	<ul style="list-style-type: none"> • Excellent (9-10): Response and/or supporting information <i>exceeds</i> rating factors by <i>meticulously</i> demonstrating experience and/or ability to provide the proposed services. Provides <i>extensive</i> evidence of current ability to comply with statutory and programmatic requirements. Applicant <i>very clearly</i> demonstrates financial stability and fiscal integrity. • Very Good (7-8): Response and/or supporting information <i>meets</i> rating factors by <i>fully</i> demonstrating experience and/or ability to provide the proposed services. Provides <i>substantial</i> evidence of current ability to comply with statutory and programmatic requirements. Applicant <i>clearly</i> demonstrates financial stability and fiscal integrity. The response is not considered excellent or outstanding but is <i>above average</i> and has no omissions or defects. • Good (5-6): Response and/or supporting information <i>meets</i> rating factors by <i>adequately</i> demonstrating experience and/or ability to provide the proposed services. Provides <i>sufficient</i> evidence of current ability to comply with statutory and programmatic requirements. Applicant <i>adequately</i> demonstrates financial stability and fiscal integrity. There may be omissions or defects, but these do not impair the reviewer’s ability to understand the response. • Fair (3-4): Response and/or supporting information <i>barely meets</i> rating factors by providing a <i>limited</i> description of experience and/or ability to provide the proposed services. Provides <i>limited</i> evidence of current ability to comply with statutory and programmatic requirements. Applicant <i>minimally</i> demonstrates financial stability and fiscal integrity. The response is of <i>average to below average</i> quality. • Poor (1-2): Response and/or supporting information <i>does not meet</i> rating factors. One or multiple of the following conditions may be true: <ul style="list-style-type: none"> ○ Applicant provides an <i>unsatisfactory</i> description of experience and/or ability to provide the proposed services. ○ There is <i>minimal or no</i> evidence of current ability to comply with statutory and programmatic requirements. ○ Applicant <i>fails</i> to demonstrate financial stability and fiscal integrity. <p>Due to the presence of the above-mentioned conditions, the response, overall, is incomplete and/or weak.</p> • Not Included (0): Response and/or supporting information omitted from the proposal.

Preference Points	<ul style="list-style-type: none"> Up to 5 preference points may be given based on the extent by which the applicant can demonstrate that its board members, decision makers, and/or staff have been directly impacted by the WoD. Evidence to meet this criterion may include (but not limited to): letters of support, resumes, biographies, organizational charts, etc.
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Section II: Priority Populations and Community	
Maximum Points Possible	35
Intent	<p>Ascertain and/or understand:</p> <ul style="list-style-type: none"> Evidence of need and demand for services in the applicant's priority population and community (hereinafter "priority populations").
<p>Questions</p> <p>(Note: Questions 2a & 2b will also be asked of each organization in a collaborative application)</p>	<ol style="list-style-type: none"> Problem statement/problem description. <ol style="list-style-type: none"> Describe the impact the WoD and/or past federal or state drug (hereinafter "WoD") policies have had on the populations you are serving. What aspects or issues of these impacts will your proposal focus on or address? Describe characteristics of the major populations or clients that your organization has served historically, particularly in the past year. Include information about their demographics, social and economic wellbeing, family or individual challenges and strengths. <ol style="list-style-type: none"> Of the clients you have served in the last 12 months, have at least 40% been formerly incarcerated in prison? (<i>See preference point section</i>) Of the client you have served in the last 12 months, have at least 75% been formerly incarcerated in prison? (<i>See preference point section</i>) If proposed activities are new, describe characteristics of the population you expect to serve. Provide evidence of the need and demand for services in the priority population. Describe the gaps and/or barriers your organization has identified in existing programs and services (within your organization or in your community) as they relate to the proposed services in your grant application.
Rating Factors	<p>Scores in this category are based on the applicants' ability to demonstrate that:</p> <ul style="list-style-type: none"> The need and demand for services is identified and measurable. The priority population and community are identified. The magnitude or urgency of the need justifies the use of state funds. Overall, the need matches the statutory intent of CalCRG provisions in Proposition 64 including serving communities and populations disproportionately impacted by past federal and state drug policies.
Point Scale	<ul style="list-style-type: none"> Excellent (29-35): Response and/or supporting information <i>exceeds</i> rating factors by <i>meticulously</i> identifying the priority populations and the need and demand for the proposed services. Applicant <i>clearly</i> and <i>extensively</i> describes the impact of the WoD on the priority populations and how the use of CalCRG funds will create a positive impact.

	<ul style="list-style-type: none"> • Very Good (21-28): Response and/or supporting information <i>meets</i> rating factors by <i>fully</i> identifying the priority populations and the need and demand for the proposed services. Applicant <i>clearly</i> describes the impact of the WoD on the priority populations and how the use of CalCRG funds will create a positive impact. The response is not considered excellent or outstanding but is <i>above average</i> and has no omissions or defects. • Good (14-20): Response and/or supporting information <i>meets</i> rating factors by <i>adequately</i> identifying the priority populations and the need and demand for the proposed services. Applicant <i>sufficiently</i> describes the impact of the WoD on the priority populations and how the use of CalCRG funds will create a positive impact. There may be omissions or defects, but these do not impair the reviewer’s ability to understand the response. • Fair (7-13): Response and/or supporting information <i>barely meets</i> rating factors by <i>minimally</i> identifying the priority populations and the need and demand for the proposed services. Applicant provides a <i>limited</i> description of the impact of the WoD on the priority populations and/or how the use of CalCRG funds will create a positive impact. The response is of <i>average to below average</i> quality. • Poor (1-6): Response and/or supporting information <i>does not meet</i> rating factors. One or multiple of the following conditions may be true: <ul style="list-style-type: none"> ○ Response <i>insufficiently</i> identifies the priority populations and the need and demand for the proposed services. ○ Applicant provides an <i>inadequate</i> description of the impact of the WoD on the priority populations ○ Applicant provides an <i>inadequate</i> explanation of how the use of CalCRG funds will create a positive impact. <p>Due to the presence of the above-mentioned conditions, the response, overall, is incomplete and/or weak.</p> • Not Included (0): Response and/or supporting information is omitted from the proposal.
Preference Points	<ul style="list-style-type: none"> • Of the clients served in the last 12 months, an applicant may receive up to 5 preference points if at least 40% of its clients have been formerly incarcerated in prison. • Of the clients served in the last 12 months, an applicant may receive up to 10 preference points if at least 75% of its clients have been formerly incarcerated in prison. • This claim must be supported by documentation that may include but is not limited to intake records, past reports to funders, client statistics, etc.

Section III: Proposal Description, Implementation, and Goals	
Maximum Points Possible	35
Intent	<p>Ascertain and/or understand:</p> <ul style="list-style-type: none"> • The details of the applicant’s proposal • If and how the applicant is prepared and able to support the proposed services • The applicant’s work plan and timeline • The goals of the applicant’s proposal • The applicant’s expected outputs and outcomes if awarded a CalCRG grant
Questions	<ol style="list-style-type: none"> 1. What will your organization do to bring about the change needed to solve/address the problem (e.g. we will teach formerly incarcerated individuals’ industry specific and in-demand skills to help them obtain employment)? Describe in detail how your organization will implement the proposed services. 2. Is there evidence to validate the effectiveness of the proposed services as a means of solving the problem referenced in the Priority Populations and Community section (i.e., likelihood of achieving the desired impact)? If yes, please describe. <ol style="list-style-type: none"> a) Have other organizations used a similar model to produce the desired outcome? If yes, please describe. 3. What are the key assumptions behind your approach (what would need to be true for your approach to work)? 4. How does your organization intend to reach the priority populations? 5. Describe the client journey from beginning to end once the proposed services are fully implemented or expanded. If applicable, please describe your intake and referral processes. 6. Why is your organization uniquely suited to address the needs of your priority populations? 7. How have the proposed services been designed to meet the cultural, linguistic, and population-specific needs of the service recipients? <ol style="list-style-type: none"> a) Describe your organization’s policies, protocols, and trainings and how they ensure that staff deliver culturally competent programs and services. 8. Did the priority populations participate in the design of the proposed services? If so, how? 9. In what ways will the priority populations be involved in the administration of the proposed services? 10. Does your organization implement a whole person care approach, which considers the full spectrum of needs – medical, behavioral, socio-economic, etc. – of the priority population in a coordinated and integrated way? If so, how? 11. Does your organization collaborate or plan to collaborate with other partners in delivering services or promoting the well-being of the priority populations to achieve whole person care? If so, how?

	<p>12. Has your organization developed and/or adopted any trauma-informed¹¹ policies? If so, please describe the policies and share how the policies have shaped your organization's practices. These could include policies related to hiring and onboarding, physical workspaces, staff supervision and support, staff education and training, client screening, client intake, or client treatment. (See <i>preference point section</i>)</p> <p>13. What are the goals of the proposal and how will these goals address the stated need/problem?</p> <p>14. What are the expected outputs (e.g. number of people served) of the proposal?</p> <p>15. What are the expected outcomes (e.g. increased health status in populations served) for people served during the grant term?</p> <p>16. Describe how you will be able to demonstrate that your approach is being carried out as intended.</p>
Rating Factors	<p>Scores in this category are based on the applicant's ability to demonstrate that:</p> <ul style="list-style-type: none"> • The proposed services are clearly described including the capacity to commit staff with appropriate experience and relevant expertise. • Convincing evidence is provided that the proposed services will likely improve the priority populations' health, wellness, and economic well-being with regards to the focus areas identified. • The priority populations are included in the proposed services development and implementation. • The service provider represents the needs and interests of the priority populations. • The applicant and/or partners involved are prepared to serve the population to the scale and quality needed to deliver the projected impact and implement a whole person care approach. • The applicant and/or partners are working towards implementing a whole person, trauma informed approach. • The goals describe measurable and achievable outcomes that can be used as performance standards. • Overall, achieving the goals will substantially address the needs described in Section II. • Goals are clearly laid out in the work plan and timeline is feasible. • Overall, the proposed services are well designed to achieve the desired impact.
Point Scale	<ul style="list-style-type: none"> • Excellent (29-35): Response and/or supporting information <i>exceeds</i> rating factors by providing a <i>meticulous</i> description of the proposed services, <i>extensive evidence</i> of proposal feasibility, and <i>very clear</i> goals. Applicant demonstrates <i>extensive involvement</i> of the priority

¹¹ A program, organization, or system that is trauma-informed:

- Realizes the widespread impact of trauma and understands potential paths for recovery;
- Recognizes the signs and symptoms of trauma in clients, families, staff, and others involved with the system;
- Responds by fully integrating knowledge about trauma into policies, procedures, and practices; and
- Seeks to actively resist re-traumatization.

population in program development and the proposed services are *specifically tailored* to the needs of the priority population. Application indicates that staff will have *excellent* knowledge and skills regarding whole person care and/or trauma-informed practices.

- **Very Good (21-28):** Response and/or supporting information *meets* rating factors by providing a *full* description of the proposed services, *substantial evidence* of proposal feasibility, and *clear* goals. Applicant demonstrates *substantial involvement* of the priority population in program development and the proposed services are *tailored* to the needs of the priority population. Application indicates that staff will have *appropriate* knowledge and skills regarding whole person care and/or trauma-informed practices. The response is not considered excellent or outstanding but is *above average* and has no omissions or defects.
- **Good (14-20):** Response and/or supporting information *meets* rating factors by providing an *adequate* description of the proposed services, *sufficient* evidence of proposal feasibility, and *somewhat clear* goals. Applicant demonstrates *meaningful involvement* of the priority population in program development and the proposed services are *tailored* to the needs of the priority population. Application indicates that staff will have *some* knowledge and skills regarding whole person care and/or trauma-informed practices. There may be omissions or defects, but these do not impair the reviewer's ability to understand the response.
- **Fair (7-13):** Response and/or supporting information *barely meets* rating factors by providing a *limited* description of the proposed services, *minimal evidence* of proposal feasibility, and/or *unclear* goals. Application indicates *limited* involvement of the priority population in program development and the proposed services are *narrowly tailored* to the needs of the priority population. Application *indicates* staff will have very limited knowledge and skills regarding whole person care and/or trauma-informed practices. The response is of *average to below average* quality.
- **Poor (1-6):** Response and/or supporting information *does not meet* rating factors. One or multiple of the following conditions may be true:
 - Response contains an *unsatisfactory* description of the proposed services, *insufficient evidence* of proposal feasibility, and/or *unclear* goals.
 - Response *does not indicate* that the priority population has been involved in program development and/or the proposed services are *not tailored* to the needs of the priority populations.
 - Application *does not indicate* staff capacity building or a training plan regarding whole person care and/or trauma-informed practices.

Due to the presence of the above-mentioned conditions, the response, overall, is incomplete and/or weak.

- **Not Included (0):** Response and/or supporting information omitted from the proposal.

Preference Points	<ul style="list-style-type: none"> • An applicant may receive up to 2.5 points if they can meaningfully show that job placement is a priority and focus of the proposed services through the narrative and budget (monetarily). • An applicant may receive up to 2.5 points if they can meaningfully demonstrate trauma-informed care implementation through organizational policies, procedures, and/or training records.
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Section IV: Evaluation Plan	
Maximum Points Possible	10
Intent	<p>Ascertain and/or understand:</p> <ul style="list-style-type: none"> • The overall effectiveness of proposed services • The applicant's quality improvement procedures • The applicant's ability to continue to provide the proposed services without additional CalCRG funding in future years.
Questions	<ol style="list-style-type: none"> 1. What internal controls will be in place to reduce the risk of misuse of resources and to ensure accurate financial reporting? 2. What procedures will be in place to ensure that the services will be implemented as planned? (Process evaluation) 3. What procedures will you use to ensure you receive and use client feedback to inform decision making that leads to program improvement? 4. What is your plan for evaluating the effectiveness of your proposed services? (Outcome evaluation) <ol style="list-style-type: none"> a) What methods and key measurements will you use? b) Who is/are the main individual/s responsible for the evaluation and describe their background? c) How will the evaluator be involved in the design and implementation of the evaluation? d) Describe how you will ensure that your evaluation is impartial and objective. 5. In what ways will the priority populations be involved in the evaluation of the proposed services? 6. What is the likelihood that the proposed services will be able to continue without additional CalCRG funding in future years? Why?
Rating Factors	<p>Scores in this category are based on the applicant's ability to demonstrate that:</p> <ul style="list-style-type: none"> • Overall, the evaluation plan permits for a fair assessment of the extent to which the proposal's goals have been met. • The evaluation methodology described is rigorous enough to indicate the extent to which outcomes are due to proposed services. • The priority populations will be meaningfully involved in the outcome evaluation. • The evaluator's experience suits the type of proposed services described in Section III. • The evaluator has an appropriate role in evaluation design and implementation and is sufficiently consulted throughout the proposal to ensure it can be evaluated.

	<ul style="list-style-type: none"> • Process evaluation plan conveys the organization’s commitment to quality improvement and demonstrates that client feedback will drive decision making.
Point Scale	<ul style="list-style-type: none"> • Excellent (9-10): Response and/or supporting information <i>exceeds</i> rating factors by <i>meticulously</i> describing the process and outcome evaluation plans and <i>very clearly</i> indicates how the priority populations will be involved in the evaluation process. Evaluation plans indicate the evaluator is experienced and has an appropriate role in the planning and delivery of the proposed services. • Very Good (7-8): Response and/or supporting information <i>meets</i> rating factors by <i>fully</i> describing the process and outcome evaluation plans and <i>clearly</i> indicates how the priority populations will be involved in the evaluation process. Evaluation plans indicate the evaluator is experienced and has an appropriate role in the planning and delivery of the proposed services. The response is not considered excellent or outstanding but is <i>above average</i> and has no omissions or defects. • Good (5-6): Response and/or supporting information <i>meets</i> rating factors by <i>adequately</i> describing the process and outcome evaluation plans and indicates how the priority populations will be involved in the evaluation process. Evaluation plans indicate the evaluator is <i>somewhat</i> experienced and has an appropriate role in the planning and delivery of the proposed services. There may be omissions or defects, but these do not impair the reviewer’s ability to understand the response. • Fair (3-4): Response and/or supporting information <i>barely meets</i> the rating factors by providing a <i>limited</i> description of the process and outcome evaluation plans and of how the priority population will be involved in the evaluation process. Evaluation plans indicate the evaluator has <i>limited</i> experience and/or has a <i>limited</i> role in the planning and delivery of the proposed services. The response is of <i>average to below average</i> quality. • Poor (1-2): Response and/or supporting information <i>does not meet</i> rating factors. The following condition may be true: <ul style="list-style-type: none"> ○ Applicant provides an <i>unsatisfactory</i> description of the process and outcome evaluation plans. <p>Due to the presence of the above-mentioned condition, the response, overall, is incomplete and/or weak.</p> • Not Included (0): Response and/or supporting information omitted from the proposal.

Section V: Budget	
Maximum Points Possible	10
Intent	<p>Ascertain and/or understand:</p> <ul style="list-style-type: none"> • Ensure funds are used on eligible and justifiable activities.
Questions	<ol style="list-style-type: none"> 1. Fill out the budget. 2. Using the budget narrative as a guide, describe your proposal’s costs and related expenses for each budget line item and activity.

<p>Rating Factors</p>	<p>Scores in this category are based on the applicant’s ability to demonstrate that:</p> <ul style="list-style-type: none"> • The proposal’s budget is detailed and reflects the time necessary for start-up of the service delivery period, time for measurement of outcomes, and includes service, personnel, and overhead costs. • Items listed in the budget are allowable and reasonable. • Overall, the items in the proposal’s budget are clearly justified given the organization’s needs and resources in regard to the proposed services. • Only reasonable and justifiable costs are included in the indirect cost rate.
<p>Point Scale</p>	<ul style="list-style-type: none"> • Excellent (9-10): Response and/or supporting information shows an <i>exceptionally</i> detailed and clear budget that justifies planned program activities, costs, and any additional information requested in the rating factors section. Response <i>exceeds</i> the requirements that demonstrates the proposed costs are allowable and reasonable. • Very Good (7-8): Response and/or supporting information demonstrates a <i>detailed and clear</i> budget that justifies costs are related to planned program activities, and the costs meet the requirements of being allowable and reasonable. The response is not considered excellent or outstanding but is <i>above average</i> and has no omissions or defects. • Good (5-6): Response and/or supporting information <i>meets</i> the basic grant solicitation requirements and demonstrates that the costs listed in the budget are allowable and reasonable. There may be omissions or defects, but these do not impair the reviewer’s ability to understand the response. • Fair (3-4): Response and/or supporting information <i>meets</i> the minimum budget rating factors to describe how the funds relate directly to program activities and the costs are allowable and reasonable. The response is of <i>average to below average</i> quality. • Poor (1-2): Response and/or supporting information is <i>inadequate</i> and/or does not meet the rating factors. One or both of the following conditions may be true: <ul style="list-style-type: none"> ○ Budget narrative provides very minimal description of the program activities ○ Significant program costs are not allowed or unreasonable such as unjustifiable costs included in the indirect cost rate. <p>Due to the presence of the above-mentioned conditions, the budget, overall, is incomplete and/or weak.</p> • Not Included (0): Response and/or supporting information omitted from the proposal.