



*Applying and Meeting Requirements  
for San Francisco Bay Restoration Grants:  
Supplementary Information*

The “Grant Program Guidelines” (adopted June 9, 2017) ‘Grant Agreement Provisions’ (section IV.C.), and the “Request for Proposals” (adopted September 8, 2017) ‘Grant Agreement’ section (section V.g, page 12) provides important information about what is expected from the grantee in addition to the submission of a grant application.

The following provides more detail about the **typical** process and possible associated costs and time commitment.

*Generic Sequence of Activities After Submitting a Grant Application  
to the San Francisco Bay Restoration Authority*

1. San Francisco Bay Restoration Authority (Restoration Authority) staff will screen projects to ensure that:
  - a. The project and potential grantee meets the Authority’s eligibility requirements as outlined in the Authority’s enabling legislation;
  - b. The project is consistent with supporting the programs and priorities and other purposes set forth in Measure AA; and
  - c. The project will have environmental documents completed in time to be presented to the San Francisco Bay Restoration Authority Board (Board) within the next 12 months.
2. Complete applications that have passed the screening process will be reviewed and evaluated by a minimum of three professionals with relevant expertise in the Authority’s program areas (as described in the enabling legislation and Measure AA). Reviewers may include, but are not limited to, public agency staff, consultants, academics, Authority staff and Advisory Committee members. Reviewers will rank applications and prioritize them for recommendation to the Governing Board of the San Francisco Bay Restoration Authority (Board) (see application for description of selection process). In order to receive funding, a project must be authorized by the Board. Selected high priority projects may be recommended to the Board as early as a few months after grantee is notified, or later depending on the project’s readiness, urgency for funds, and availability of Restoration Authority staff. The Authority expects that it will take an average of six months from application submittal to Governing Board approval and at least one additional month for execution of the grant agreement.
3. A Restoration Authority Project Manager is assigned to the proposed project. They will contact the grantee to learn more about the project and arrange for a tour of the project site, if appropriate. The Project Manager will be the grantee’s main contact at the Restoration Authority from the beginning to the end of the project.

4. The Project Manager writes a detailed staff recommendation for the Board's consideration, including any letters of support gathered by the grantee as an exhibit to the report. The staff recommendation will describe the project, will explain how the project is consistent with and advances the purposes of the Authority's enabling legislation and Measure AA, and will be available to the public in advance of the meeting. The staff recommendation is reviewed by several Restoration Authority staff members, including a Program Manager, an attorney, and the Executive Officer.
4. Board meetings take place about four times each year and are held at various locations around the San Francisco Bay region. For each project, the Project Manager will make a brief presentation to the Board members, usually followed by a presentation by the grant applicant. The Board generally votes on staff's recommendations at this same meeting.
5. Following Board approval, the Project Manager prepares a draft Grant Agreement. This Agreement is legally binding and includes requirements of the grantee and information about how and when funds can be disbursed. The draft Agreement is reviewed by the Program Manager, Restoration Authority attorney, and the Restoration Authority's contracts office. It can also be sent in draft form to the grantee. The process required to prepare and mail out a final agreement usually takes at least three weeks. Five copies of the final Agreement are sent to the grantee for signatures, and all five are sent back to the Restoration Authority. The Executive Officer signs each copy and one fully executed copy is sent back to the grantee.

It is important that the person administering the project for the grantee be familiar with the procedures and requirements of the agreement. It may be useful for the grantee to arrange a meeting with the Project Manager early in the project to review agreement conditions.

6. The Grant Agreement requires the grantee to prepare additional documents for the Executive Officer's review and approval before the project may begin (or, at least, before the parts of the project for which the Conservancy will be asked to provide reimbursement may begin). Typical accompanying documents include:
  - a work program that includes a budget and schedule of tasks to be completed
  - the names, titles, and pay rates of subcontractors, if any
  - proof that all necessary permits have been obtained
  - signage informing the public that the project received Restoration Authority grant funding, where appropriate
  - verification of adequate liability insurance and naming the Restoration Authority as an additional insured
  - a resolution from the grantee's governing board
  - a monitoring program may be required either before project start or by project completion
  - other legal documents that may require notarized signatures and recording.

For projects involving the acquisition of property or conservation easements, appraisals, title documents, escrow instructions, and other documents will be required. Restoration Authority staff can provide guidance upon request.

7. Once the Project Manager has received and the Executive Officer has approved all of the required additional documents and the Grant Agreement has been signed, the Project Manager will provide a written approval for the project to commence.

8. Invoices can then be sent to the Restoration Authority for reimbursement of tasks specifically agreed upon in the Grant Agreement and its accompanying work program. A completed “Request for Disbursement” form (provided by the Project Manager, along with an instruction sheet) serves as an invoice. The invoices will be reviewed by the Project Manager and the contracts office. Payment will be mailed to the grantee usually within three weeks after the invoice is found to be complete. *Generally, the Authority will withhold ten percent of invoiced amounts until the project is satisfactorily completed.*
9. At project completion, the grantee submits a final invoice for remaining project costs and withheld amounts along with a final Lessons Learned summary report of the project. Projects that require monitoring and maintenance provide regular reports for a defined period of time. Upon the Project Manager’s assessment that all requirements of the Grant Agreement have been met, the agreement is closed.

*Non-Reimbursable Expenses:* Expenses incurred before the contractual agreement with the Authority is completed are not reimbursable. Such expenses should be discussed with the Project Manager early in the application and agreement preparation phase if pre-agreement costs will be a problem for the grantee.

#### *Other Time Commitments*

1. Staff Reports may include letters of support. Normally, the grantee takes responsibility for requesting and securing letters of support, including letters from key legislators and other elected officials.
2. A brief narrative explanation of project progress, which must be consistent with the work program, should accompany invoices.
3. The Project Manager will call or meet with the grantee and schedule site visits, as appropriate, from time to time to assess project progress.