



## Typical Sequence of Activities for Receiving San Francisco Bay Restoration Authority Grants

The following document provides details about the **typical** process of receiving San Francisco Bay Restoration Authority grants.

1. San Francisco Bay Restoration Authority (Restoration Authority) staff track all project applications submitted during the application period of a grant round.
2. After the application period closes, Restoration Authority staff screen projects to ensure:
  - a. The project and potential grantee meet 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 Governing Board (Board) within the next 12 months.
3. Eligible applications are reviewed by a minimum of three professionals with relevant expertise in the Authority's program areas (e.g., Authority staff and Advisory Committee members). Reviewers rank applications and pose follow up questions to applicants as needed.
4. Applicants are notified as to whether their project will be recommended to the Board for funding. If a project is selected for funding recommendation, 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.
5. All selected projects must be authorized for funding by the Board at a noticed public meeting. Selected 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 Project Manager prepares a detailed staff recommendation for the Board's consideration, including any letters of support gathered by the grantee (e.g., letters from key legislators and other elected officials, project partners, and community-based organizations) as an exhibit to the report.

Board meetings take place about five times each year. For each project, the Project Manager will make a short presentation to the Board members, usually followed by a brief statement by the grant applicant. The Board generally votes on staff's recommendations at this same meeting. The Authority expects it will take at least six months from application submittal to Board approval.

6. Following Board approval, the Project Manager prepares a Grant Agreement. This Agreement is legally binding and includes requirements of the grantee and information about how and when funds can be disbursed. Preparation and execution of a final agreement may take two months or more.

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

7. The Grant Agreement requires the grantee to prepare additional “conditions precedent” documents for the Project Manager’s review and approval before the project may begin (or, at least, before the parts of the project for which the Restoration Authority 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 staff and any subcontractors
  - Proof that all necessary permits have been obtained
  - A plan for signs and/or other outreach acknowledging the Restoration Authority’s funding
  - Verification of adequate insurance and 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

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.

8. Once the Grant Agreement has been signed and all additional documents have been received and approved, the Project Manager provides a written approval for the project to commence. The Project Manager will call or meet with the grantee and schedule site visits, as appropriate, from time to time to assess project progress.
9. Invoices can 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) serves as an invoice. A brief narrative explanation of project progress, which must be consistent with the work program, should accompany invoices. Payment will be mailed to the grantee usually within three weeks after the invoice is found to be complete.

Expenses incurred before the grant agreement is executed are not reimbursable, and the Authority withholds five percent of invoiced amounts until the project is satisfactorily completed. If these restrictions are an issue, the grantee should discuss with the Project Manager early in the application and agreement preparation phase.

10. 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 after project completion. Upon the Project Manager’s assessment that all requirements of the Grant Agreement have been met, the agreement is closed.