



SAN FRANCISCO BAY

RESTORATION AUTHORITY

New Grantee Onboarding Webinar

Linda Tong, Deputy Program Manager

Sara Haugen, Project Manager

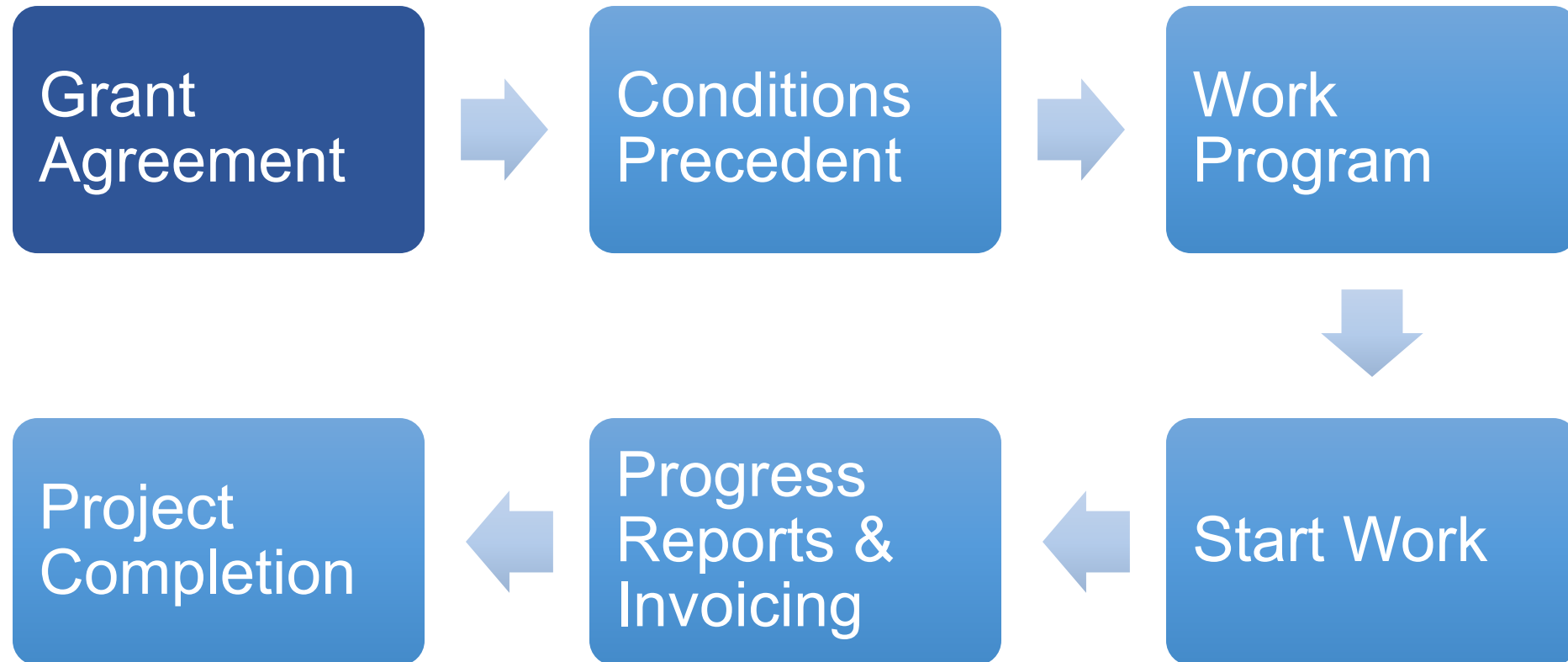
Katya Beener, 2025 Sea Grant Fellow

June 13, 2025

Congratulations!!!



Best Practices for Grant Management

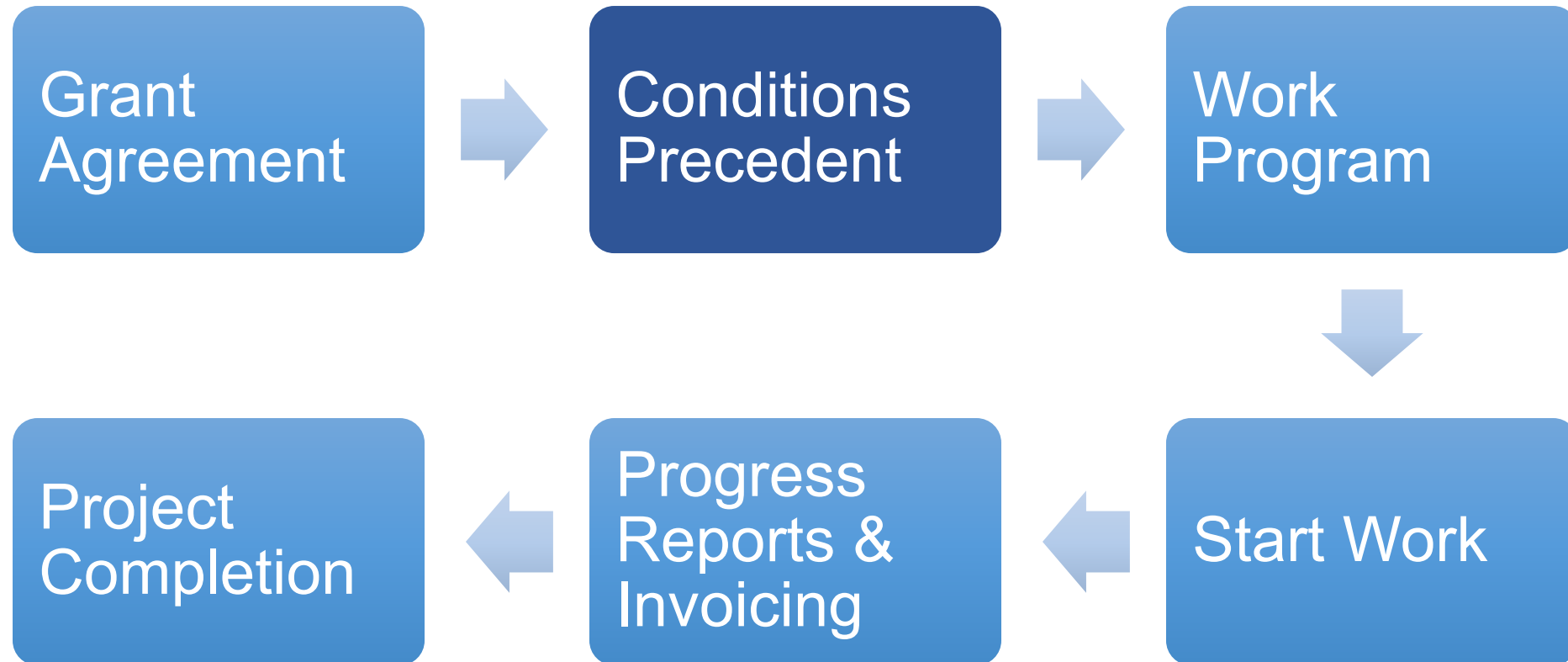


Grant Agreement

- Outlines how and when funds can be disbursed
- Legally Binding
- Three important dates:
 - Completion Date (when work must be completed by)
 - Final Request for Disbursement Date (final invoice date)
 - Termination Date (when grant will close)
- Grant number will be used on future documents



Best Practices for Grant Management



Conditions Precedent

- Board resolution (from your board) accepting the funds
- Proof of insurance
- EcoAtlas Entry
- Landowner agreement (If physical improvement and you don't own property)
- Proof that all necessary permits have been obtained
- Work program
 - Budget
 - Schedule of tasks to be completed
 - Plan for acknowledgement of funding



Grantee Board Resolution

- Authorizes a designated person to act as a representative of the grantee
- Template can be found here: [Board Resolution Template](#)

Sample Resolution

Resolution No. _____

Resolution of the [City Council/Board of Supervisors/Board of Private Entity/etc.]

Approving the Grant of Funds from the
San Francisco Bay Restoration Authority

For (project title)

WHEREAS, the San Francisco Bay Restoration Authority Act, Government Code §§ 66700-66706, establishes the San Francisco Bay Restoration Authority (“Authority”) as a regional entity to generate and allocate resources for the protection and enhancement of tidal wetlands and other wildlife habitat in San Francisco Bay and along its shoreline, and authorizes the Authority to award grants to public and private entities to achieve these purposes; and

WHEREAS, the Authority awards grants for eligible projects consistent with Government Code § 66704.5, the Authority’s Grant Program Guidelines, first adopted in May 2017, and the Authority’s San Francisco Bay Clean Water, Pollution Prevention and Habitat Restoration Measure (“Measure AA”), passed by the voters in June 2016.

Proof of Insurance

- Amounts and types of insurance vary by project type, check grant agreement
- Typically, at minimum:
 - General Liability
 - Automotive Liability
 - Worker's Compensation

ACORD **CERTIFICATE OF LIABILITY INSURANCE** DATE (MM/DD/YYYY)
10/25/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fidelity Insurance Service a member of United Valley 801 Allston Way Berkeley CA 94710	CONTACT Aliyyah Harvey NAME PHONE (A/C, No, Ext): (510) 548-8200 FAX (A/C, No): (510) 548-8145 E-MAIL: aharvey@fidelityinsuranceservice.com ADDRESS:
INSURED California Wildlife Foundation 428 13th Street, #10A Oakland CA 94612	INSURER(S) AFFORDING COVERAGE INSURER A: Employers Compensation Ins. 98988 INSURER B: NIAC INSURER C: INSURER D: INSURER E: INSURER F:

COVERAGES CERTIFICATE NUMBER: CL16102508292 REVISION NUMBER:

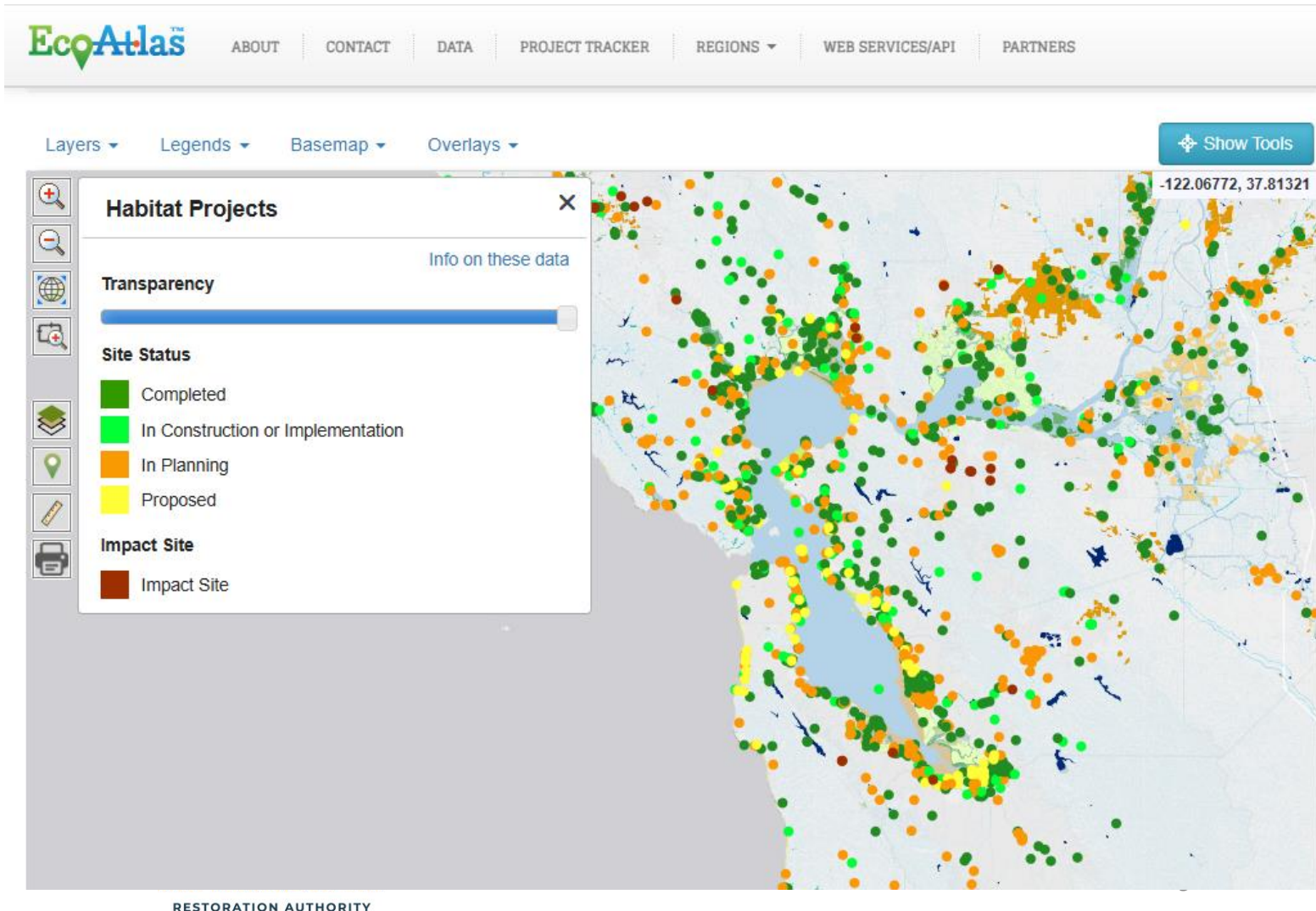
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR	TYPE OF INSURANCE	ADDL SUBR	POLICY NUMBER	POLICY EFF	POLICY EXP	LIMITS
LINE		INCL. EXCL.		(MM/DD/YYYY)	(MM/DD/YYYY)	
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO. <input type="checkbox"/> LOC <input type="checkbox"/> OTHER	X	201616063990	7/20/2016	7/20/2017	EACH OCCURRENCE DAMAGE TO RENTALS PREMIER (Per occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 500,000 PERSONAL & ADV INJURY \$ 20,000 GENERAL AGGREGATE \$ 1,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRE AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	X	201616063990	7/20/2016	7/20/2017	COMBINED SINGLE LIMIT (Per accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR	X	201616063990	7/20/2016	7/20/2017	EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/REMIER EXCLUDED? (Waiver in RM) If yes, describe upon DESCRIPTION OF OPERATIONS below:	Y/N Y N/A	20033110012	11/1/2016	11/1/2017	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYER \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

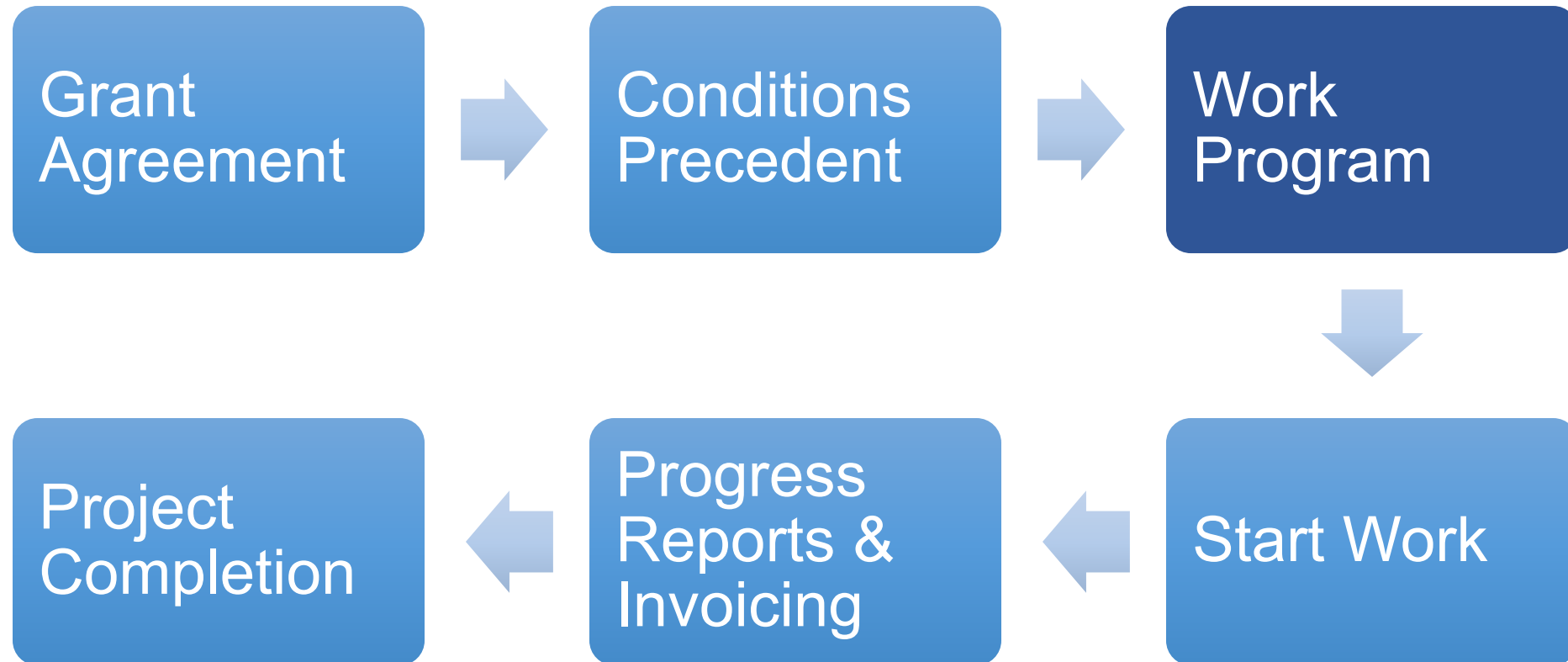
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
 The State of California, its officers, agents and employees are named additional insured, per the attached endorsement.

EcoAtlas Entry

- [California EcoAtlas](#)
- Grantees are required to use the Project Tracker tool to create and maintain an EcoAtlas entry
- Work with SFBRA staff to create entry
- Instructions can be found here: [Project Tracker Instructions For Grantees](#)



Best Practices for Grant Management



Work Program

- Establishes the project's budget & schedule
- Is checked against your invoices
- Can be amended more easily than the grant agreement
- Outlines:
 - The specific tasks to be performed
 - A schedule of completion for the project
 - list the date for completing each project component
 - A project budget
 - list intended funding sources for each project component
- Template can be found here: [SFBRA Work Program Template](#)

Work Program : Project Description

- Short, high-level summary of your project

PROJECT DESCRIPTION

Goal



Steps
toward
goal



The purpose of this project is the enhancement of approximately three acres of the existing back dunes at Bruce's Beach in Manhattan Beach from approximately 36th Street to 23rd Street, within 0.6 miles of coastline. The restoration project will involve the removal of non-native vegetation, seeding/planting of native vegetation, strategic installation of sand fencing and other features to help establish vegetation, installation of symbolic fencing, and installation of educational features like interpretive signage.



SAN FRANCISCO BAY
RESTORATION AUTHORITY

Work Program: Scope of Work

Task 2 Name of Task

[Insert description of the work that will be completed for this task. Use subtasks only if necessary. Deliverables are products, not actions, that are submitted to the project manager that demonstrate project milestones or effectiveness, such as plans, reports, photos, etc.]

Subtask 2.1

[Insert brief description]

Subtask 2.2

[Insert brief description]

Task Deliverable(s):

[Deliverables are products, not actions, that can be emailed to your project manager to demonstrate that you are meeting project milestones. For Task 1 Project Management, please keep the deliverables written in black text. For all other Tasks, you may choose what deliverables you will submit to your Authority Project Manager.]

Work Program: Schedule

Work Completion Date: [use date in Grant Agreement]

Final Request for Disbursement and Final Progress Report: [use date in Grant Agreement]

Grant Termination Date: [use date in Grant Agreement]

Task Number	Task Title	Deliverable	Estimated Start Date	Estimated Completion Date
1	Project Management	Progress Reports	Not Applicable	Monthly throughout the contract term
		Invoices		Monthly throughout the contract term
		Subcontractor Documentation		Prior to subcontractor starting work
2	XX	X		
3	XX	X		
4	XX	X X		

Work Program: Budget

- Simple entries allow for more flexibility

Task Number	Task Title	SFBRA Grant
1	Project Management	\$37,250
2	Planning	\$12,386
3	Construction	\$89,565
4	Community Engagement	\$12,500
	Indirect Cost Rate (18%)	\$27,199
TOTAL		\$178,900

Work Program: Budget Details

- Direct Costs:
 - Project supplies
 - Travel costs
 - Staff time/labor
 - Stipends
- Indirect/Overhead Costs (max 20%):
 - Rent, office supplies and equipment
- Contractors and Subcontractors

Budget guidelines can be found here:

[SFBRA General Budget Guidelines](#)



Work Program: Plan for Acknowledgement

- Signage or other interpretive elements
- Social media posts
- Websites
- Program brochures
- Press releases
- Signage guidance can be found here: [SFBRA Acknowledgement Guidance](#)

Dear Ms. Davenport:

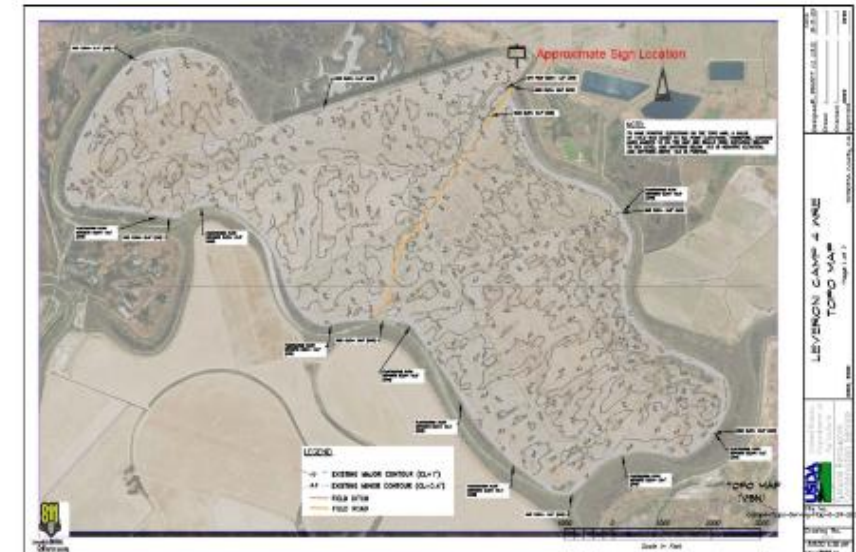
This letter serves as Sonoma Land Trust's sign plan pursuant to grant agreement SFB0037-RA015. SLT plans to install the funding acknowledgement sign within 60 day of close of escrow, which is currently anticipated for August 31, 2023.

The following is an example of what the sign will look like with the substitution of the SFBRA logo and the following language: "*Funded by the San Francisco Bay Restoration Authority, for a clean and healthy bay.*" The logos will only include the SFBRA logo, the Gordon and Betty Moore Foundation logo and an acknowledgment of private donors.

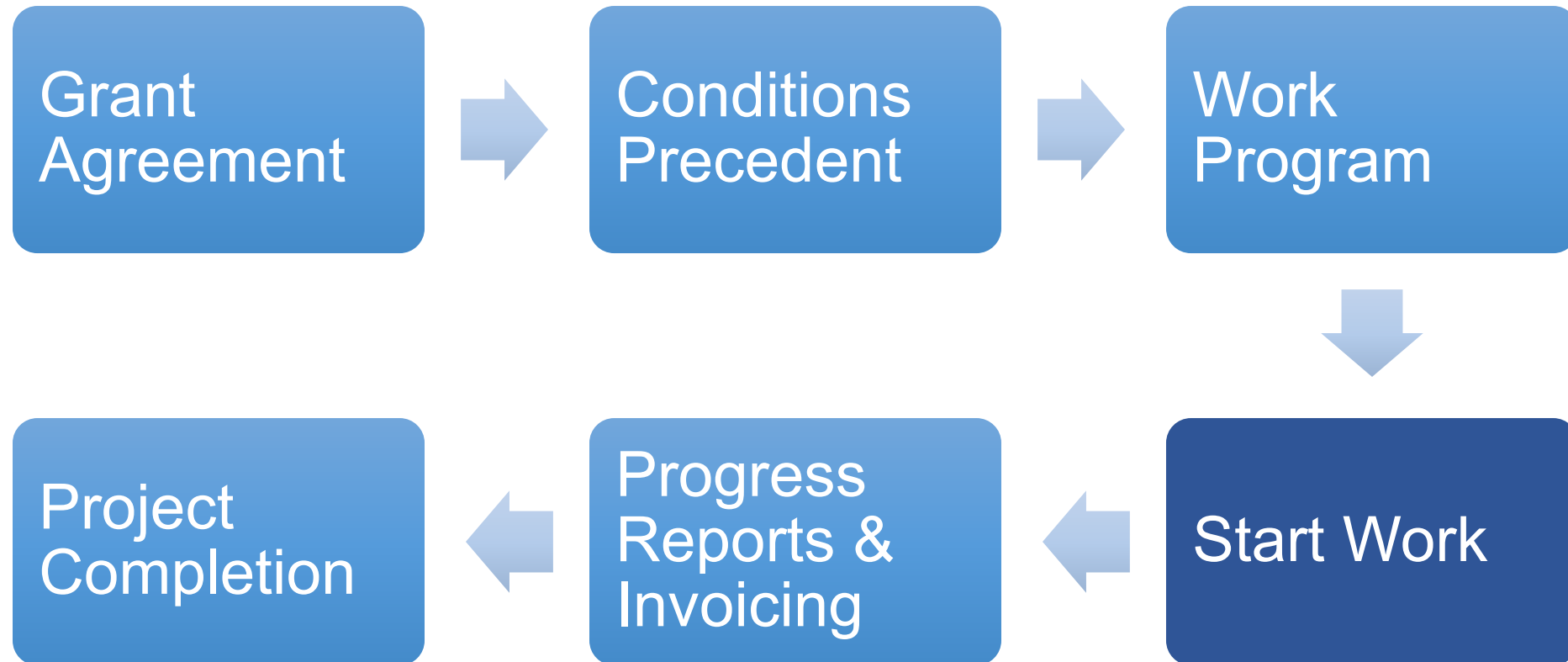


The sign will be installed at a location that maximizes visibility along Ramal Road based on the best lines of sight from both directions. The example photo above is of a 51x75 inch sign on 4x4 posts buried in concrete in three foot holes. SLT will get you a design mock-up with these dimensions within 30 days of close of escrow with exact location, logos and text. We are securing a contract with ChromaGraphics to produce the sign with installation by Paul Ferinato Construction who worked on the sign from the photo above.

The sign will also have a QR Code leading to a project



Best Practices for Grant Management



Start Work

- Must receive a notice to proceed before starting work
- You can bill to the grant starting on the date of the Notice to Proceed letter



Governing Board

Sup. Dave Pine
Chair
County of San Mateo

Sup. John Gioia
County of Contra Costa

Sup. Susan Gorin
County of Sonoma

Councilmember Sophie Hahn
City of Berkeley

Director, Karen Holman
Midpeninsula Regional Open
Space District Board

Councilmember Sally Lieber
City of Mountainview

Sup. Aaron Peskin
City & County of SF

Sam Schuchat
Executive Officer

Address:
c/o State Coastal Conservancy
1515 Clay Street, 10th Floor
Oakland, CA 94612

Telephone: 510-286-7193

Email: info@sfbayrestore.org

Web: www.sfbayrestore.org

June 9, 2021

Brian M. Balbas, Chief Engineer
Contra Costa County Flood Control & Water Conservation District
255 Glacier Drive
Martinez, CA 94553

RE: Satisfaction of Conditions Precedent- Grant Agreement #SFB0001-RA0013

Dear Mr. Balbas:

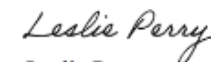
This letter confirms that the Contra Costa County Flood Control & Water Conservation District (District) has satisfied the "Conditions Precedent to Commencement of Project Disbursement" listed in San Francisco Bay Restoration Authority Grant Agreement #SFB0001-RA0013 for the "Lower Walnut Creek Restoration Project", and that work can start on all tasks in the Work Program.

I hereby approve and/or acknowledge receipt of:

- The Work Program, including project tasks, completion dates, budget, and the acknowledgment of Restoration Authority funding (dated April 30, 2021).
- All permits and approvals necessary for completion of the project have been obtained.
- Evidence that the District has entered into a project labor agreement with the local Building Trades Council.
- Evidence that the District has entered into a written agreement with the State Lands Commission (letter dated May 7, 2021).
- Evidence of sufficient property rights to carry out the project.
- Evidence that the District and its contractors are insured in a manner that is consistent with the Grant Agreement.

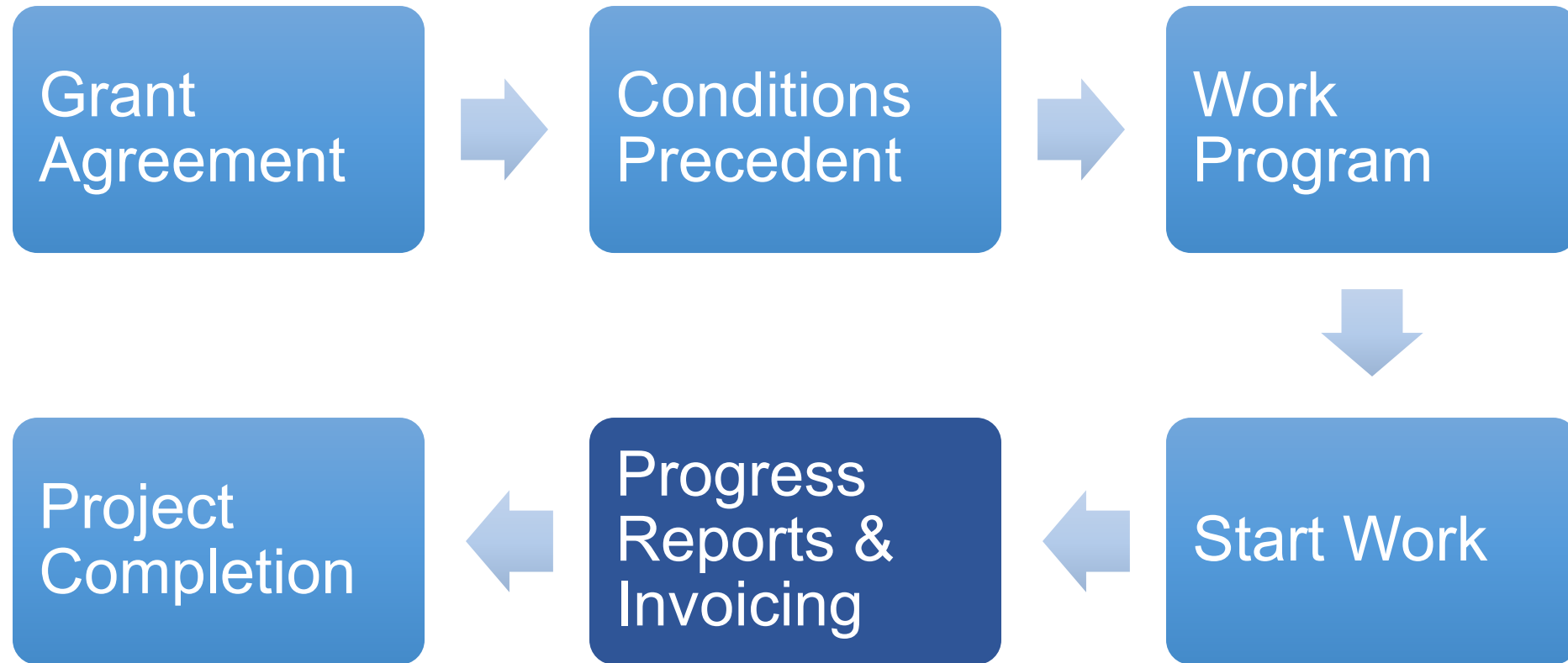
We are glad to have the opportunity to support your efforts towards restoring Lower Walnut Creek and look forward to seeing the project move forward.

Sincerely,



Leslie Perry
Project Manager


Best Practices for Grant Management





Invoicing

- Submit invoices using Request for Disbursement (RFD) form
- Must be consistent with work program
- No more frequently than monthly and no less frequently than quarterly
- Invoice = Progress Report + RFD + Backup Documentation
- Will be routed for signatures after SFBRA staff review
- RFD Guidelines can be found here: [SFBRA RFD Instructions](#)



 **SAN FRANCISCO BAY**
RESTORATION AUTHORITY

 Form will autocalculate fields highlighted in yellow.
 From Work Program, should be the same for each invoice

REQUEST FOR DISBURSEMENT FORM


Name of Grantee/Contractor:		Agreement No.	Invoice No.	
Address (include zip code):		Project Name:		
		Billing Period Covered:		
		From:	To:	
Work Program Task Number and Name	Task Budget	Costs Incurred this Period	Total Cost to Date	Remaining Balance
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
Subtotal Tasks	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Costs (Indirect Rate <input type="text"/> % (fill in if applicable))				\$0.00
TOTAL	\$0.00	\$0.00	\$0.00	\$0.00
LESS: Five (5%) or Ten (10%) Percent Withhold (if applicable). Enter as a negative number.			<i>Attach all receipts of expenditures, Progress Report, and other supporting documents required. (For signature blocks below, Restoration Authority staff will circulate for electronic signatures after review.)</i>	
RELEASE OF WITHHOLDING	Final Invoice Task completion <input type="checkbox"/>			
TOTAL AMOUNT REQUESTED		\$0.00		
CERTIFICATION OF GRANTEE/CONTRACTOR I hereby certify that the above costs were incurred in the performance of work required under the agreement and are consistent with the amounts evidenced by supporting documents and expenditures.				
Signature _____		Printed Name and Title _____		Date _____
AGREEMENT EXPENDITURE APPROVALS The undersigned certifies that all conditions precedent to disbursement and all other legal prerequisites for this disbursement have been met.				
Approval Requested:		Approval Recommended:		Request Approved:
Project Manager		Program Manager		Executive Officer
MTC Fund Source:		MTC Contract Number:		Program: Measure AA

Invoicing: RFD

This side of the form summarizes the expenses from the billing period

Task #, name & budget must match your approved Work Program

Withholding of 5% kept until final deliverables completed

 **SAN FRANCISCO BAY**
RESTORATION AUTHORITY

Form will autocalculate fields highlighted in yellow.
From Work Program, should be the same for each invoice

REQUEST FOR DISBURSEMENT FORM

Name of Grantee/Contractor:		Agreement No.	Invoice No.	
Address (include zip code):		Project Name:		
		Billing Period Covered: From: To:		
Work Program Task Number and Name	Task Budget	Costs Incurred this Period	Total Cost to Date	Remaining Balance
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
				\$0.00
Subtotal Tasks	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Costs (Indirect Rate % (fill in if applicable))				\$0.00
TOTAL	\$0.00	\$0.00	\$0.00	\$0.00
LESS: Five (5%) or Ten (10%) Percent Withhold (if applicable). Enter as a negative number.				
RELEASE OF WITHHOLDING		Final invoice Task completion <input type="checkbox"/>		
TOTAL AMOUNT REQUESTED			\$0.00	

Attach all receipts of expenditures, Progress Report, and other supporting documents required. (For signature blocks below, Restoration Authority staff will circulate for electronic signatures after review.)

Invoicing: RFD

Breaks down expenses listed on previous page

All expenditures require you to submit backup documentation

Provide breakdown of labor costs by staff title, rate, and hours worked

% Indirect cost must match Work Program (typically up to 20%)

Subcontractor charges

GRANTEE/CONTRACTOR EXPENDITURE:		
(A) Materials and Equipment	Receipt/Invoice#	Amount
SUB-TOTAL		\$0.00
(B) Labor - Description (Job Title) and number of hours worked	Hourly Rate	Amount
SUB-TOTAL		\$0.00
(C) _____ % Indirect Cost (fill in if applicable)		
(D) SUB-CONTRACTOR'S EXPENDITURE:		
Company Name	Invoice #	Amount
		23
SUB-TOTAL		\$0.00

Backup Documentation: Expenses

- Paid receipts
- If purchased online, show "shipped"
- No bank statements
- Save your receipts!

amazon.com

Final Details for Order #112-6229743-4271434

Paid By: Refugee Enrichment & Development Association
Placed By: Refugee Enrichment & Development Association
Order Placed: February 21, 2022
Amazon.com order number: 112-6229743-4271434
Order Total: \$137.14

Shipped on February 23, 2022	
Items Ordered 1 of: Swingball Championship All Surface Portable Tether Tennis Set - Ages 4+ Sold by: Amazon (seller profile) Business Price Condition: New	Price \$44.32
Shipping Address: Refugee Enrichment and Development Association 8907 SERRAVILLA WAY ELK GROVE, CA 95758-6325 United States	Item(s) Subtotal: \$44.32 Shipping & Handling: \$5.39 Free Shipping: -\$5.39 ----- Total before tax: \$44.32 Sales Tax: \$3.43 ----- Total for This Shipment: \$47.75

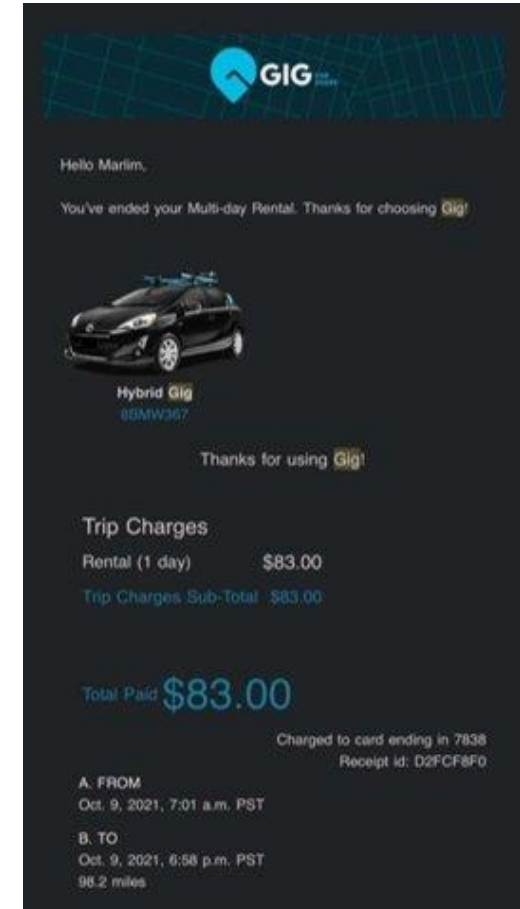


Backup Documentation Examples: Travel

- Personal vehicle mileage reimbursement rate (with travel record). Effective January 1, 2025: **\$0.70/mile**

	To	From	Van	Purpose	Mileage	Amount
4/7/22	Campus Point	PAL Teen Center	Bellota	PAL	43	\$25.16
05/03/22	Ellwood	Tucker's Grove	Bellota	Treefrogs	18	\$10.53
3/14/22	Finney St.	Ennisbrook	Bellota	Treefrogs	33	\$19.31
5/4/22	Goleta Beach	Tucker's Grove	Bellota	Mockingbirds	33	\$19.31
5/19/22	Goleta Beach	PAL Teen Center	Bellota	PAL	34	\$19.89
4/4/22	Hammonds	Ennisbrook	Bellota	Treefrogs	28	\$16.38
4/6/22	Hammonds	Rocky Nook	Bellota	Hérons	40	\$23.40
4/22/22	Haskell's	Rocky Nook	Bellota	Hérons	41	\$23.99
4/21/22	Haskell's	PAL Teen Center	Bellota	PAL	40	\$23.40

- OR Gas (with receipt)
 - + rental car cost (if applicable)
- Lodging (hotel receipt)
- Parking and tolls
- Food can be billed per CalHR meal reimbursement rates



Backup Documentation Examples: Subcontractors

- Provide subcontractor invoices as backup.
- Examples:
 - Cultural resource specialist
 - Community engagement specialist
 - Design consultant
 - Project-related accounting or technical assistance



Progress Reports

- Main highlights as they relate to the tasks you outlined in your work program
- Update on project progress by task
- Optional:
 - We love pictures & stories! Send directly to PM
- Template can be found here: [Progress Report Form](#)

PROGRESS REPORT

Please provide a progress report either using this form or a separate document. The progress report should summarize: 1) the current status of the project, and 2) the work done on each work program task during the billing period.

1. Briefly summarize the current status of the project. (For example, is the project on track to finish on schedule and within budget or are there issues impacting the overall successful completion of the project?)
2. Briefly summarize the work done on each work program task for which you are seeking disbursement of funds (i.e., the work done during the billing period).



Invoicing Process

1. Grantee

- Emails invoice to SFBRAinvoice@scc.ca.gov with project name & contract #, copies their PM
- Includes unsigned invoice with fund source, back up docs, and progress report



2. Contracts

- Reviews invoice for any revisions, notifies PM for changes or that it is ready for review



3. Project Manager

- Reviews Invoice for any issues and resolves those with grantee (if necessary)
- Routes invoice for DocuSign



4. MTC Finance

- Cuts check for grantee to be mailed



Advance Payment

- Talk to your project manager if reimbursement will be challenging for your grant
- Evaluated on a case-by-case basis
- If approved, this will be the payment method for the entirety of the grant
- Send an email to your grant manager with:
 - Organization Name
 - Project Name
 - Restoration Authority grant agreement number
 - Brief explanation as to why advanced payment is necessary
 - Example of staff timesheet records showing time tracked to different projects or activities (only required if the grantee will be billing for staff time)

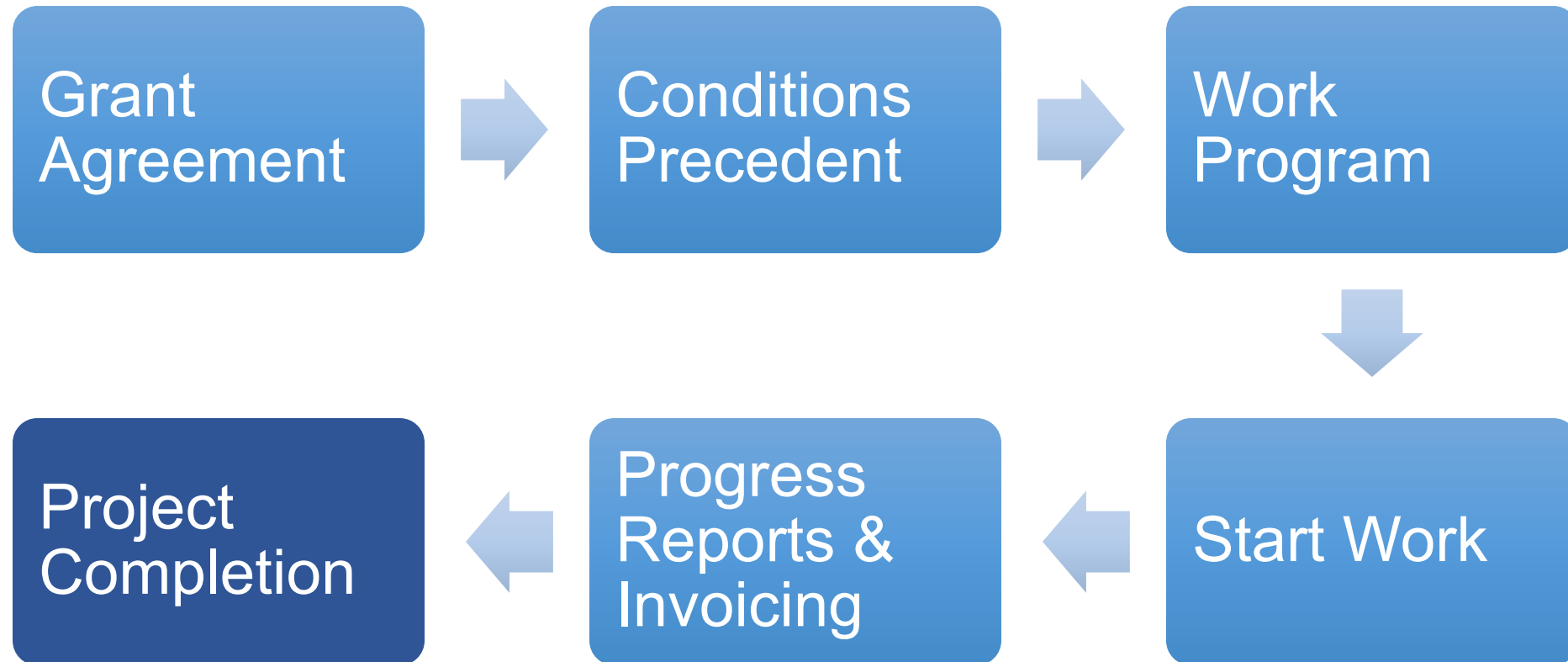


Throughout your project:

- Keep us involved!
- Invite us to:
- Site visits
- Community events
- Public events
- Press conferences



Best Practices for Grant Management



Project Completion

- Final invoice for remaining project costs and withheld amounts
- Final Lessons Learned summary report of the project
 - Template found here: [Lessons Learned Template](#)
- Projects that require monitoring and maintenance provide regular reports after project completion



Lessons Learned Report Template for Projects Funded by SFBRA Grants

The purpose of this document is to capture lessons learned, and other critical information, for the projects funded by SFBRA grants.

Please delete italicized text in your responses, and any other text that is unnecessary after answering questions under each heading.

- I. **Project Name:**
- II. **Measure AA Project Types and Phases:**
 - a. *Please indicate which Measure AA Program(s) your project addressed:*
 - i. *Safe, Clean Water and Pollution Prevention Program;*
 - ii. *Vital Fish, Bird and Wildlife Habitat Program;*
 - iii. *Integrated Flood Protection Program; or*
 - iv. *Shoreline Public Access Program*
 - b. *Please indicate your Measure AA Project Phase:*
 - i. *Acquisition; Planning; Design; Environmental Studies; Permitting; Construction; Monitoring and Evaluation; Operation; Scientific Studies (as part of the project to guide adaptive management); or Maintenance*
 - c. *Did the Measure AA Program(s) addressed and/or project phases change over time? If so, please explain here.*
- III. **Project Goals and Objectives:**
 - a. *Please re-state the original project goals & objectives (metrics) as stated in your application. Please provide final metrics if they have changed from your original estimates (eg. Acres of habitat restored, # volunteers engaged, # plants installed).*
 - b. *Did the goals and objectives change over time? If so, please explain how they evolved and where they stand as of project completion.*
- IV. **Lessons Learned:**
 - a. *In what ways was your project particularly successful in achieving its objectives and why?*
 - b. *Which objectives were harder to achieve and why?*
 - c. *If you had to do the project all over again, or had to give advice to someone who was doing a similar project, what would you do differently, based on your experience with the project?*

Resources

- <https://www.sfbayrestore.org/resources-grantees>
- Your project manager





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Thank you!

Questions?

