

From Planning to Partnership: A Practical Guide to San Francisco Grantmaking

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Topic	Starting Page
Introduction & Purpose	2
Tips on How to Use this Guidance Document	2
Overview of Major Grant Procurement Phases	3
The Procurement Lifecycle: Step-by-Step Details	4
Common City Grant Requirements	10
Common Grantmaking Terminology	13



Welcome to the Grant Guide

Introduction & Purpose

Navigating the City and County of San Francisco’s social service grantmaking process can feel complicated—whether you’re a City staff member trying to translate your department’s program vision into a Request for Proposal (RFP), or a grantseeker hoping to partner with the City. You’re not alone if you’ve ever wondered, “*What are the different steps to submit a grant application?*” or “*Who is supposed to do what here?*”

This guide is designed to help answer those questions. This guide’s goal is to begin **demystifying the social service grantmaking lifecycle**—from initial planning to navigating opportunities and finalizing grant agreements. This document aims to make the process more transparent, predictable, and easier to understand for both City staff and grantseekers.

You’ll find plain-language explanations of what happens at each stage, how to prepare, and why certain steps exist—because **understanding why the City requires something often makes it easier to move through the process**. And while this guide is focused on social services grantmaking, many of these processes apply to other types of grants as well (like grants for arts and culture, community beautification, green infrastructure, and more.)

Tips on How to Use This Guide

This guide is designed for both City staff and grantseekers. You can narrow in on the sections that are most relevant to your perspective, or you can read through the entire guide to understand the full grantmaking cycle.

If you are a City staff member, you’d likely be interested in:

- [The Grantmaking Lifecycle steps](#) (the **left-side columns** on pages 4–9)
- [Common City grant requirements](#) to keep in mind

If you are a grantseeker, you’d likely be interested in:

- [The Grantmaking Lifecycle steps](#) (the **right-side columns** on pages 4–9)
- [Common City grant requirements](#) to keep in mind
- The [explanations of common procurement terminology](#)

Special note to City staff:

While this guide is specific to grantmaking processes, it’s important to recognize that **grants and contracts are part of a larger service delivery model**. Grantmaking and procurement are not things that come at the end of a program or strategic planning process; they’re integral parts of realizing your program strategy. So **start early and if you’re someone who is in more of a programmatic role, reach out to your grants and procurement colleagues ASAP!**



Disclaimer

While this guide does its best to provide a holistic overview of the City’s grantmaking process, each grant may have additional, unique considerations based on a City department’s individual business processes and funding source requirements (i.e. state, federal, or philanthropic requirements). As such, there may be steps and considerations that are not captured in this guide. Moreover, specific policy thresholds and dates may change over time. This guide should be used for informational purposes only. **It is the responsibility of City staff and grantseekers to make sure they are referencing the most up-to-date deadlines, policies, and documents. This guidance does not constitute legal advice, nor do the processes outlined in this document supersede applicable federal, state, or local laws, or the procedures outlined in a grant solicitation or a grant agreement.**

Note: Generative AI was used to assist in part of the creation of this guidance document. Rest assured that many humans thoroughly planned out the content, designed it, reviewed it, edited it, and then reviewed it again before publishing it.

Overview of Major Grantmaking Phases



The City's grantmaking process falls into **five broad phases**:

- 1. Plan & Prepare.** This phase is the precursor to the grantmaking itself. During this phase, City staff conduct strategic planning, identify service needs, and translate them into grant opportunities. This phase can last anywhere from a few weeks to over a year, depending on the complexity and breadth of service challenges the City is trying to address. Grantseekers don't need to take any formal actions during this phase but can stay connected by signing up for newsletters, attending community meetings, watching for opportunities, and assessing their own grant readiness.
- 2. Solicit or Propose.** For City staff, this is when a Request for Proposals (RFP) is issued, questions from proposers are addressed, and preparations for evaluation begin. For grantseekers, this is likely to be one of the most intensive phases of the grantmaking cycle: reviewing the RFP, forming partnerships if needed, and developing a grant proposal.
- 3. Evaluate & Award.** This is when proposals and interviews (if the selection process includes interviews) are scored. This is another intense phase for City staff as it involves reading through proposals and finalizing award decisions. For grantseekers, this phase can require a lot of patience. Unless the selection process involves an interview or City staff need to reach out to you for clarifying information, you may not hear much from City staff. It can feel like nothing is happening, but please rest assured that an evaluation panel is hard at work reviewing proposals and working through difficult decisions.
- 4. Negotiate & Sign.** After awards are determined, City staff and awarded grantseekers finalize the scope of work, budget, and grant terms. The length of this phase varies depending on whether and what the City and the awarded grantseeker choose to negotiate. Additionally, during this time, City staff need to gather all required internal approvals for the grant award to proceed, which can vary by department and by grant amount.
- 5. Implement.** Once a grant agreement has been fully signed by both the City and the grantseeker, the grantmaking phase ends and the work of delivering social services to the community and managing the grant agreement begins. Since this guide is focused on early grantmaking phases, we don't go into detail about what implementing a grant with the City entails, but we've included a few pointers for City staff and grantees alike to help you understand what to expect throughout the lifecycle of a grant.

Curious to learn more?

The next section of this guidance, [The Procurement Lifecycle: Step-by-Step Details](#), goes into more detail about different steps that occur during each of these major phases.

PLAN & PREPARE PHASE (Part 1 of 2)

City Staff

1 Identify Needs

 estimated timeline: 6–12+ months

Identifying needs is a critical component of both service planning and grant planning. Before the grantmaking cycle even starts, City staff should seek to understand: Who needs social services? What services do they need? How do they access those services and/or what barriers do they experience in accessing needed services?

Activities during this phase may include:

- Conducting community needs assessments
- Broadly engaging community members
- Conducting data analysis on current outcomes, disparities, disproportionalities, or other factors


2 Define the solutions & approach

 estimated timeline: 6 – 12+ months

Once you understand needs, your department should determine the best ways for addressing them. During this stage, consider: What are the different strategies for addressing different types of needs? Who can provide the needed services? At what scale? Are there other departments addressing similar needs?


Activities during this phase can include:

- Determining whether the services may be provided through grants or contracts*
- Researching best practices, existing solutions, and their suitability for adaptation or innovation
- Defining your service portfolio and grant priorities
- Identifying funding sources and understanding their requirements (e.g. State and/or federal regulations)
- Conducting a feasibility analysis or identifying implementation constraints (e.g. provider capacity, staff capacity, funding, or other inputs)
- Defining maximum number of awardees or award sizes

 ***Special Note!** While many processes for grants and contracts are similar, there are important differences in legal terms and conditions, workflows and approvals, and other policy requirements. If you're not sure whether something should be a grant or a contract, check with your Deputy City Attorney.

Grantseekers

1 Assess opportunities & readiness

 estimated timeline: as your capacity permits

Social services grantmaking often occurs in cycles. You can usually find out where a department is in its grantmaking cycle by checking out its website or strategic plan. To prepare yourself for the next round of grant opportunities, it's a good idea to do some research on the opportunities available beforehand, stay engaged with City departments' outreach efforts, and think about your organization's capacity and whether receiving City funds is the right fit for you.

Things you can do to prepare:

- ❑ **Clarify your strategic direction and organizational capacity.** Being a City grantee can be a great opportunity to contribute to building community support systems – but it also comes with a lot of compliance and reporting requirements. You can [learn more about specific requirements](#) later in this guide. Take the time to figure out whether pursuing City grants is the right funding model for your organization.
- ❑ **Consider whether you need a fiscal sponsor or a fiscal agent.** If you are interested in City opportunities but don't yet have the staffing or administrative capacity to meet City requirements, a fiscal sponsor or agent might be able to help you scale up. If you need a fiscal sponsor, it's important to find one before applying for a grant.
- ❑ **Explore City departments' websites and newsletters and stay engaged in community input activities** to understand whether your mission aligns with City funding priorities. Many departments conduct surveys, host workshops, meetings, focus groups, and other outreach events prior to issuing grants. These activities could happen as early as 1–2 years before a call for grant applications is even issued if the department is engaged in an extensive needs assessments process.

Preparation tips continue on the next page!

PLAN & PREPARE PHASE (Part 2 of 2)

City Staff

3 Draft the RFP and prepare solicitation documents

 estimated timeline: 2–6 months

Now it's time to draft your RFP! RFP drafting is often a team effort. Be sure you've gathered the relevant stakeholders to be part of your drafting team, assigned clear roles and responsibilities, and set a timeline for getting the work done.



Consider: Is there another department addressing a similar need? Can you partner with them to issue an RFP?




Consider: Who will draft the RFP? Who will serve as evaluators?

During this stage, **you should be thinking both programmatically and operationally:** How can you operationalize your program vision through the grantmaking process? What are the contractual requirements that apply based on the types of services that your department is seeking?

Example Programmatic Considerations	Example Contractual Considerations
<ul style="list-style-type: none"> • Set Minimum Qualifications, including nonprofit registry requirements • Draft application questions • Define success and outcome metrics, evaluation criteria 	<ul style="list-style-type: none"> • Determine risk levels (e.g. Would services involve working with minors or other special populations? Do programs need access to critical systems or sensitive data?) • Determine insurance levels

4 Prepare to launch the RFP!

 estimated timeline: 1–2 months

Beyond the RFP itself, you need to think about your outreach strategy and what happens after the RFP closes. How are organizations going to find out about the opportunity? Will you host pre-proposal conferences and host technical assistance workshops open to everyone? What's your communications plan? What's your Q&A protocol? Who will serve on your evaluation panel? What support might they need?

Grantseekers

Assess opportunities & readiness, continued:

- ❑ **Research opportunities.** Check out [the directory of City departments who frequently issue grant opportunities](#). You can view each agency's website to check for upcoming opportunities.
- ❑ **Review past Requests for Proposals (RFPs), if available.** RFPs are documents that the City issues to let people know about grant (or contract) opportunities. Reviewing past RFPs can help familiarize you with what City departments look for and how departments select grantees. Past RFPs may be available on individual agencies' websites.
- ❑ **Understand whether the funding opportunities you're interested in are for grants or for contracts.** While grantmaking and contracting processes in the City are very similar, there are important differences between how some legal requirements apply for grantees vs. contractors. The RFP for the opportunity you're interested in should explicitly state whether it's for grants or for contracts.
- ❑ **Register as a City Supplier (optional during this preparation phase, required if you are later awarded a grant):** To get paid by the City, awarded grantseekers will eventually need to have a Supplier ID and comply with various Supplier requirements. There is no cost to becoming a City Supplier, and completing the process early can speed up future administrative steps if you are awarded a grant. However, registering as a City Supplier and submitting compliance documents involve time and effort. Early registration does not improve your chances of winning an award, and it does not guarantee that you'll later receive funding. You can decide if this is something you want to start now or wait until a later phase of the grant process to begin. You can learn more about [the steps to become a City Supplier on the City's website](#).

SOLICIT/PROPOSE PHASE

City Staff

5 Issue the RFP

 estimated timeline: 1–4 months

After the RFP is finalized, post it! During the posting phase, keep in mind:

- You're required to **post the grant opportunity broadly**. At minimum, you should post on your department's website, [SF City Partner](#), or both.
- For most solicitations under Chapter 21G, you will need to **keep the solicitation open for at least 21 days**.
- You should have a **designated solicitation point of contact**. All questions and communications related to the RFP should go through the designated contact person.

Other activities in this phase include:

- ❑ **Optional: Host a pre-proposal conference** to provide an overview of the grant opportunity, Minimum Qualifications, selection procedures, evaluation criteria, and other grant requirements. Pre-proposal conferences are not legally required, but they are considered a best practice.
- ❑ **Gather and respond to questions using your established Q&A process**. All prospective proposers' questions about the RFP should be submitted in writing — or transcribed into writing, if you're taking questions during in-person engagement sessions. All responses should also be captured in writing. Answers to questions need to be made available to all prospective proposers within a similar timeframe so that no proposer has an informational advantage over another.
- ❑ **Optional: Collect Letters of Intent (LOI)**. LOIs can be a helpful way of knowing who plans to respond to your RFP so you can better adjust your outreach and evaluation workload. Some departments make them mandatory, and some use them to screen whether a prospective proposer would meet MQs. If you're going to make LOIs mandatory or use them as a screening tool, you must have stated so in your RFP.

Grantseekers

2 Prepare your proposal

 estimated timeline: 1–4 months


Once an RFP is posted, it's time for the proposal development process to begin! **To get started:**

- ❑ **Read the RFP and note your questions.** RFPs can be long documents, so it's important that you dedicate enough time to reviewing them. Be sure to carefully review the funding purpose and the grant requirements to see if the opportunity is a fit for your organization's mission and capacity.
- ❑ **Attend the pre-proposal conference, if offered.** This is your opportunity to learn more about grantmaking priorities and requirements.
- ❑ **Submit your questions according to the directions in the RFP.** The City's process for answering questions can feel a bit rigid at times. There are many communication restrictions and rules City staff must follow to ensure that no single proposer receives non-public information or gains an unfair advantage. Please be patient and know that City staff actively review all questions!
- ❑ **If required or suggested in the RFP: Submit a Letter of Intent (LOI).** Departments may collect LOIs to gauge how many proposals they are likely to receive or use it as a screening tool to determine whether your organization qualifies for funding before you go through the work of creating a full proposal. (If you're told you don't qualify and disagree with the decision, you'll have an opportunity to ask for a second review).
- ❑ **Read any addenda and be sure you're responding to the most recent version of the RFP.** Departments may need to update the RFP to correct an error, clarify something confusing, or provide additional instructions. Please review these carefully!
- ❑ **Write your proposal clearly, succinctly, and prepare your budget.** Answer any required questions fully (but remember: longer isn't necessarily better). Make sure your proposal is easy to read, understand, navigate, and uses any required templates provided.
- ❑ **Submit your proposal on time!**

EVALUATE & AWARD PHASE

City Staff

6 Evaluate & Award


 estimated timeline: 1–3 months if no delays

Once the proposal deadline has passed, it's time to start reviewing submissions and selecting awardees.

Activities in this phase can include:


- **Checking MQs** (if not already done through an LOI process)
- **Hosting an evaluation kick-off meeting** with your panelists to help them understand what is expected of evaluators, what scoring calibration across proposals and evaluators will look like, what to look for in proposals, and how to stay on top of the evaluation timeline
- **Scoring proposals against the established rubric**
- **Scheduling, hosting, and scoring interviews** (if your evaluation process includes interviews)
- **Finalizing awardee selection**
- **Issuing a Notice of Intent to Award**
- **Responding to protests**

Note: The specific actions you'll need to take in each of the activities above are likely to depend on what you've outlined in your RFP and your own departmental processes.

 **Remember!** Ethics are a core principle of all public service. Evaluators must **review all qualified proposals with fairness and impartiality, with a lens towards advancing the public interest – never personal gain**. If you or someone on your selection panel ever has questions or concerns about what they should or should not do in evaluating proposals, reach out to your department leaders, Deputy City Attorney, or the Ethics Commission for further guidance.

Grantseekers

3 Post-submission

 estimated timeline: 1–3 months if no delays

After the submission deadline, City staff will review proposals and complete required internal processes. This phase tends to be quieter for proposers, and you may start to wonder if anything is happening. But please know that staff are hard at work reading proposals. City agencies are limited in what they can communicate during this phase to ensure an unbiased process. Here are a few things you should be aware of:



MQs and submission requirements review.

City staff will start by checking that your proposal submission adheres to the RFP's requirements (e.g., Did you submit all required documents? Did you use the correct templates?). Staff will also review your MQs, if not already completed through a separate LOI process.

If staff determine that your submission does not meet RFP guidelines and/or MQs, you will be notified and given an explanation why. If you disagree with the decision, you'll have the opportunity to protest the decision. Review the RFP carefully for protest procedures.



Additional information requests.

Occasionally, City staff may reach out to your organization if there's some kind of clarification or clerical fix needed on your proposal. Please do check your emails and respond to these requests. You'll usually be given a timeline to respond; if you do not respond within the given timeframe, you may not be able to continue with the process.



If applicable, prepare for interviews. If the evaluation process includes interviews, City staff will reach out to you if you're selected for an interview and may give you a sense of what the interview will cover.




Please note: The RFP will give you a timeline of how long this phase is supposed to last, but sometimes there are delays. Departments typically try to communicate delays, but if you haven't heard an update in a while, it's okay to email the solicitation point of contact and ask.

NEGOTIATE & SIGN PHASE

City Staff

7 Negotiate

 estimated timeline: 1–2 months if no delays


After you've issued your Intent to Award, the negotiation phase begins.

Be aware that there are different components of a grant agreement, and you may need to wait until protests are resolved before entering negotiations. Depending on what you're negotiating, different people may need to be involved or consulted. For example:

- **If you're negotiating the grant's scope of work or budget**, program staff may need to lead the negotiations with fiscal staff consulting.
- **If you're negotiating a legal term or condition**, your Deputy City Attorney will need to be heavily involved.
- **If you're negotiating business requirements** (e.g. insurance), operational teams and legal teams may be involved.

During this time, you should also be collecting insurance documents and obtaining waivers for City requirements if any are necessary for the grant to be approved. [See the section on common City grant requirements](#) for more details on what typically applies to grants under Chapter 21G and what can be waived.

8 Execute

 estimated timeline: 1–8 weeks depending on the number of approvals needed


After the terms of the agreement have been finalized, you'll need to gather the appropriate signatures and approvals to execute the agreement according to your department's internal workflows. Grant agreements must be signed by a legally authorized representative of the grantee, your Deputy City Attorney, and your department head or their designee.

To avoid delays, remember:

- If your department has a commission or board, you may also need to get their approval.
- If the value of the grant agreement exceeds the threshold established in [9.118\(b\)](#), you will also need Board of Supervisors approval.

Grantseekers

4 Negotiate & sign

 estimated timeline: 1–2 months if no delays

If you've been selected for an award, congratulations! Now you'll shift gears towards finalizing an agreement with the City which often involves negotiating scope, budget, and/or legal terms and conditions. The department you're working with will share an agreement template to start the process.

Before you sign the final agreement:


- ❑ **Read through terms and conditions carefully.** Terms and conditions contain a lot of legal language, so if there is something you're unsure of – ask! That said, the City cannot provide legal advice or interpret conditions on your behalf, so you may need to have your own legal counsel review.
- ❑ **Make sure you're understanding** not just the legal terms, but also the programmatic, service, financial, operational, and policy requirements.
- ❑ If there's anything about the standard conditions or other aspects of the agreement that you want to change, **provide an alternative and rationale for what you want to change.** The City will review your suggestions in good faith but is unlikely able to agree to all changes. (Note: some departments may require you to submit suggested changes to legal terms and conditions sooner, during the proposal submission phase.)
- ❑ While negotiations are happening, be sure that you **become a City Supplier and comply with all requirements.** Gather and submit any required documents or information (e.g. insurance, a valid business tax registration, etc.). [See the section on common City grant requirements](#) for more details on what is typically required of grantees and when the information needs to be provided.

If you were not selected for an award, you have the **right to protest** award decisions if you have a legitimate concern with the selection process. Be sure to check the RFP for protest procedures and timeframes. You can also **take this as a learning opportunity.** Departments may have different levels of capacity to share feedback. You may need to wait until negotiations with awarded proposers are complete for City staff to be available to engage further with you.

IMPLEMENTATION PHASE


City Staff


9 Begin grants administration and performance management!

 estimated timeline: until the end of the grant

Once the agreement has been approved and fully executed, congratulations! The grantmaking cycle itself has ended. After the grant funds have been encumbered and you've authorized the grantee to begin work, you'll move on to the grants administration and performance management phases of the grantmaking lifecycle.

Different departments may refer to these concepts using different terms, but generally, activities in this phase can include:

 **Grants administration:** monitoring compliance with City terms and conditions, fiscal monitoring, invoice review and payment, identifying and managing corrective actions when necessary, etc.


 **Performance management:** program monitoring, data analysis, ensuring program fidelity, tracking service delivery innovations, outcomes evaluation, surfacing best practices between providers, conducting site visits, identifying and issuing corrective actions when necessary, etc.

Additionally, depending on how your department is structured, some of the responsibilities listed above may be spread out across different functional teams or be handled by individual specialists.

This work can be complicated and challenging, but remember: **As a public servant, you play an important role in stewarding City funds; supporting service delivery systems; upholding ethics and accountability; and making San Francisco a fairer, more just place to live, work, and visit. Thank you for your hard work!**

Awarded Grantees

5 Begin service delivery!

 estimated timeline: until the end of the grant

Once the agreement has been fully executed and you've received confirmation that you can begin the work, your service delivery starts! Throughout the grant period, you'll work closely with City staff. Activities vary by grant, but generally, all grantees will be expected to:

- **Deliver services and center the community.** This is why we're all here in the first place!
- **Engage in program monitoring efforts**, such as site visits, data collection and analysis, performance conversations, and regular check-ins with City staff or other technical service providers. [Refer to the City's program monitoring policies for nonprofits](#) for more details.
- **Keep up-to-date with your reporting requirements**, which will be outlined in your grant agreement.
- **Keep up-to-date with annual compliance requirements** such as your Annual Economic Statement posting, holding public meetings (if the requirement applies to you), and others.
- **Engage in fiscal monitoring.** Depending on the value of your award, nonprofits may be required to participate in the [City's fiscal monitoring program](#).
- **Keep clean and detailed spending records and be aware of what's reimbursable and not reimbursable.** Your grant agreement will tell you what can and cannot be reimbursed. [Nonprofit grantees can also reference this policy document on cost categories](#) to get a general sense of what's reimbursable and what's not. Also, ask the department you're working with if it has a specific reimbursement policy.
- **Give the City feedback.** City staff know that we ask a lot of our grantee partners. Some of this is required by law; some of this is necessary to ensure proper spending of public funds. But working with the City should be a two-way street: if there are ways we can improve, please give feedback to your City partners. **The City thanks you for your dedication to the public good!**

Common City Grant Requirements (Page 1 of 3)

The following pages contain a summary of common grant requirements to keep in mind. **This is not a comprehensive list, and requirements may change over time.** Additionally, beyond grant-specific requirements, grantees must follow all applicable local, state, and federal laws. This guidance document will start to feel too unwieldy if we try to explain all the nuances of each requirement, so think of this as a starting point for you to explore more. If you have follow-up questions, you can refer to the [Municipal Code](#) or [check out this directory for who to contact](#).

What's the requirement?	Why is it necessary?	When's the deadline for completing this?	Are there exemptions?	Can it be waived?
All grantees must have a City-issued business tax ID .	Anyone conducting business with the City, including nonprofits, must be registered with the City, per the Business and Tax Code.	Before submitting a proposal (usually this is an MQ).	No	No
All grantees must become a City Supplier .	All entities must be registered as a City Supplier and have a Supplier ID in order to receive payments from the City.	Must be completed prior to grant execution.	No	No
All nonprofit grantees must have "current" status with State Attorney General registry .	Required by State law for nonprofits to complete .	Must be completed by the time of grant execution (may be an MQ).	Applies to nonprofits only.	No
All grants must be in writing and signed by authorized representatives of the grantee and City.	Grant agreements set the terms and conditions for what is expected of grantees and are important in managing City operations.	Before City-funded service delivery begins.	No	No
All grantees must submit proof of insurance and maintain coverage.	Insurance coverage is a tool for managing different kinds of risks. It protects both the City and the grantee.	Grantees must submit proof of insurance prior to signing the grant agreement and coverage must be maintained throughout the life of the grant.	Some types of insurances may not be required based on the type of service being performed.	Certain types may be waived or adjusted in consultation with the City's Legal and Risk Management teams.
Grants valued above \$50K* must be First Source Hiring (FSH) compliant (i.e. endeavor to create entry level positions to be used for the grant).	Required per Chapter 83 of the Administrative Code to create job opportunities for San Franciscans.	An FSH form must be submitted with the proposal, and grantees must comply throughout the duration of the grant.	Yes, see Chapter 83.9(a).	No

Common City Grant Requirements (Page 2 of 3)

What's the requirement?	Why is it necessary?	When's the deadline for completing this?	Are there exemptions?	Can it be waived?
Grants valued above the Minimum Competitive Amount (MCA)** must be Equal Benefits compliant (i.e. provide equal benefits to employees in domestic partnerships as those in legal marriages).	Required per Article 131 of the Administrative Code to align with the City's support of marriage equality.	An Equal Benefits declaration must be completed and confirmed by the City before the grant is signed, and grantees must comply throughout the duration of the grant.	Yes, see Article 131.6.	Yes
All for-profit grantees receiving over \$25k* and nonprofit grantees receiving over \$50k* in City funds annually must pay their employees no less than the wage rate defined by the Minimum Compensation Ordinance .	Required per Article 111 of the Labor & Employment Code to promote fair wages for employees in different sectors.	Required throughout the duration of the grant.	Yes, see Article 111.2(e).	Yes
For-profit grantees receiving over \$25k* must offer a minimum level of health benefits or expenditures to their employees, as defined by the Health Care Accountability Ordinance .	Required per Article 121 of the Labor & Employment Code to promote employee benefits.	Required throughout the duration of the grant.	Generally does not apply to nonprofit grantees.	No
Nonprofit grantees receiving grants valued at the Federal Single Audit threshold (\$1 million*) or above must hold at least 1 open board meeting per year , make their financial information publicly available, and try to include at least one community member on their Board of Directors.	Required per Chapter 12L of the Administrative Code to promote transparency and ensure that people receiving services have a voice in shaping the vision and direction of those services.	Required throughout the duration of the grant. The open meeting requirement must be completed on an annual basis.	Does not apply to grantees receiving less than the Federal Single Audit Threshold .	No

*Threshold values are current as of June 1, 2026. These amounts may change over time.

**The MCA, currently \$230,000, is tied to the Urban Consumer Price Index and is updated every five years.

Common City Grant Requirements (Page 3 of 3)

What's the requirement?	Why is it necessary?	When's the deadline for completing this?	Are there exemptions?	Can it be waived?
Nonprofits receiving grants valued at the Federal Single Audit threshold (\$1 million*) or more must post audited financial statements on their website.	Required per Chapter 10.1 of the Administrative Code to promote transparency in the use of public funds.	Annually on December 31.	Does not apply to grantees receiving less than the Federal Audit Threshold.	No
Nonprofits who have annual gross revenues over \$2 million* or receive City funds valued at or above the Federal Single Audit threshold (\$1 million*) must submit audited financial statements to the City on an annual basis.	Required per the Controller's Office Policy on Financial Audit Requirements for Nonprofit Suppliers .	Audit must be completed within 9 months of your fiscal year end.	If annual gross revenue is less than \$2 million*, no audit is required unless the City specifically funds the audit preparation.	No
Nonprofits receiving \$200,000* or more must participate in structured contract monitoring .	Required to ensure that grants are advancing public interests. See the City's nonprofit contract monitoring standards for examples of what contract monitoring includes.	Annually, with timing based on each department's policy, and with 30 days notice in writing.	Does not apply to certain types of grants.	It depends on a department's policies.
Nonprofits receiving \$500,000* or more from one department or \$200,000* or more from multiple departments must participate in structured fiscal monitoring .	Required to ensure that public funds are used responsibly. See the City's nonprofit fiscal monitoring program for more information and examples of what fiscal monitoring covers.	Annually, typically spring, and with 30 days notice in writing.	No	Yes, depending on the grantee's performance
All grantees must prepare invoices, maintain and submit records of their spending to receive payment for their work and be reimbursed for expenses by the City.	Required to ensure that public funds are used according to the terms of the agreement. Nonprofits can reference the City's guidelines on cost categorization to get a sense of the types of expenses that can be reimbursed.	Depends on the payment structure and cadence established in the grant agreement.	No	No

*Threshold values are current as of June 1, 2026. These amounts may change over time.

Common Procurement & Grantmaking Terminology

Note: The following are plain-language explanations of common City and County of San Francisco procurement terms to help anyone learning about grant procurements for the first time. These are **not official legal definitions**. There may be subtle but meaningful differences between how the same terms are used in different contexts. If you're ever unsure what something means, don't hesitate to pause the conversation to ask, "What do you mean by this phrase?"

- **Bidder:** A business or entity that has registered in the City's SF City Partner portal for the purpose of submitting a proposal or bid on grant or contract opportunities. Becoming a bidder is the first step before becoming a fully compliant City Supplier. In the grantmaking context, "grantseeker" is sometimes used interchangeably with "bidder," "proposer," or "applicant." *See also: Supplier.*
- **Chapter 21G:** The Chapter of the San Francisco Administrative Code which creates laws and processes around how City departments may conduct grantmaking.
- **Exempt:** To exclude something from a requirement. When something is exempt, the requirement is never applied. This is in contrast to a "waiver," which describes scenarios where a requirement is supposed to apply to something, but an official request is made so that the requirement does not apply. *See also: Waive.*
- **G-100:** The name of the City's grant agreement template. The City has many different templates, so each template has a shorthand name associated with it.
- **Grant:** An award of City funds to an organization to perform a public benefit (such as job training for community members, afterschool tutoring, or other community-oriented services). **Grantees can be nonprofits, for-profits, individuals, or government entities.** In some cases, departments may limit grant eligibility to nonprofit organizations (including nonprofit fiscal sponsors).
- **Grant agreement:** A formal document that establishes the roles, responsibilities, scope, and terms and conditions of a grant. Grant agreements must be signed by legally authorized representatives of the City and the grantee.
- **Letter of Intent (LOI):** An official letter from an organization stating that it intends to respond to a funding opportunity. Submitting an LOI does not mean an organization must respond to a funding opportunity, but sometimes LOIs are required before an organization can officially respond to a funding opportunity.
- **Minimum Qualifications (MQs):** The baseline qualifications that any organization or individual responding to an RFP must meet in order to be eligible for grant awards or contracts.
- **Notice of Intent to Award:** An official notice from the City at the end of an evaluation process naming the organizations (or individuals) that the City intends to award a grant to.
- **Procurement:** How governments select and buy things.
- **Request for Proposals (RFP):** A type of solicitation document outlining a funding opportunity, eligibility for receiving funding, funding requirements, and the selection process. Grantseekers typically respond to an RFP with a proposal, budget, and any other documents or samples requested in the RFP. *See also: Solicit/Solicitation*
- **Solicit/Solicitation:** To solicit is to request responses from businesses or organizations related to providing a public benefit. Governments request responses through a solicitation process, which includes issuing a document such as a Request for Proposal, outlining needs, opportunities, and selection processes. *See also: Request for Proposals*
- **Supplier:** A business or entity that has completed all required City compliance and registration steps and is eligible to do business with the City (i.e. receive payment); all entities must first have a Bidder ID before receiving a Supplier ID. In the grantmaking context, "grantee" is sometimes used interchangeably with "Supplier." *See also: Bidder.*
- **Waive:** To choose not to apply or enforce a rule or requirement. To waive a requirement, City staff must request an official waiver and obtain special permissions from authorized individuals. *See also: Exempt.*