

SF Environment

Standard process for creating an RFP for GRANTMAKING (allow 4 months from draft to selection of grantees)

Prior to starting RFP need to clarify what you are looking for. Consider:

- Goals and objectives of the program giving grant and as appropriate, any outside source funding the grants
- Any sub goals and/or co-benefits desired
- Translate G's and O's to types of projects desired/required
- Decide how projects will be measured for alignment with our goals. How will projects be evaluated? This will drive the information requested of applicants
- In the interests of absolute transparency, anything that applicants will be judged on should be articulated in the RFP—ratio of capital:staff, co-benefits, innovation, neighborhood priority, income priority, new projects, etc

Draft evaluation plan and create evaluation point allocation	Week 1
May release a notification of intent to issue RFP	Week 1
Draft RFP using standard SFE format, following standard RFP/ narrative, cover sheet, workplan and budget docs. RFP must be transparent to include all items for evaluation <ul style="list-style-type: none"> • Collaboration? • New projects? • Specific neighborhoods? • Budget concerns • Adherence to required format (will proposals be kicked out entirely or just lose points) 	Week 2
Review RFP (w/supporting attachments) for programmatic concerns.	Week 3
Review RFP for legal concerns	Week 3 (2 days)
Review RFP for projects that are being funded through a grant to SFE to make sure they are in compliance with intent of external grant	
Draft due date based on other SFE processes/events and realities of CBOs and ultimate approval at commission meeting <ul style="list-style-type: none"> • Finalize submission requirements—email, upload, mail • RFP should name one (and only one) contact for questions 	Week 3
Finalize all docs (RFP, attachments) from a programmatic perspective. (including allocation of evaluation points) Minimize attachments as much as possible—financials may not be needed until later in the process	Week 4
Finalize all docs/attachments from legal perspective	Week 4
Release RFP. <ul style="list-style-type: none"> • Existing grantees (Shawn/programs) • SFE website (outreach) • Other municipal grant making depts (Shawn) • Other grant makers (foundations) (Shawn) • All Staff—request to forward with a cover “Please excuse multiple postings—I want to make sure you see this.” • City website (Rachel Buerkle) • Other media as appropriate (definitely for neighborhood specific grants-Outreach) • Other 	Week 4
Hold bidders conference. <ul style="list-style-type: none"> • sign in sheet should include all contact info to distribute to attendees and have on record • Record all questions. A deadline should be set for questions about RFP 	Week 6
Create internal submittal/tracking chart <ul style="list-style-type: none"> • (docs submitted, amount requested, tonnage) 	
Prep potential readers and interviewers—2 internal staff, 1-2 external staff—4 on	Week 4-6

<p>each review panel is best. Once proposals are in you can decide how many reader panels you should have based on number of submissions. Every panel member does not have to read every proposal, but 2 of the panel members should read all props and be on each panel. Reviewers include:</p> <ul style="list-style-type: none"> • subject matter experts • experience running programs/non profits. • experience grantmaking 	This process can be started before proposal are in to gauge interest
<p>When inviting the reviewer. They will need:</p> <ul style="list-style-type: none"> • copy of RFP and score sheet • Why they are being asked • Clear info on time frame/process 	
Proposals submitted and entered on tracking doc	Week 8
<p>Send copies of appropriate docs to readers and interviewers</p> <ul style="list-style-type: none"> • Proposals (with workplan and budget attachments) • eval sheets • Conflict of interest form (collect) 	Week 9
Reader training/briefing	Week 9
<p>Reader review (conference call or meeting)</p> <ul style="list-style-type: none"> • Go over all scores and discuss • Give panel opportunity to revise their scores • Get all score sheets from readers 	Week 11
<p>Average all scores</p> <ul style="list-style-type: none"> • Select those for interview round • Submit interviewee proposals and score sheets to interview panel for review 	Week 11
<p>Send form letter to those who will not be interviewed.</p> <ul style="list-style-type: none"> • This should be brief and let them know they may get feedback on reviewer comments about the proposal. 	Week 11
Work with interview panel to schedule time frame for interviews/site visits	Week 12
<p>Schedule interviews</p> <ul style="list-style-type: none"> • Collect and average interviewer scores 	Week 12-13
Select grantees	Week 13
Formal thank you to external review panels	Week 13
<p>Send form letter to those who will not receive funding.</p> <ul style="list-style-type: none"> • This should be brief and let them know they may get feedback on reviewer comments about the proposal. 	Week 13
Recommend distribution of funds	Week 13
Submit recommendations for sub-grantee(s) to outside funding entity if necessary	Week 13
Submit recommendations to senior staff for review and approval	Week 13
Present recommendations to Environmental Commission for review and approval	Week 14