

Frequently Asked Questions

San Francisco General Hospital Foundation *Equity and Innovation Grants 2025*

What has changed?

The Equity and Innovation (formerly Hearts) Grants will now need to be approved through the City's Accept and Expend process which means that all expenses need to be procured through ZSFG accounting and following City & County of San Francisco (CCSF) policy and procedures. For UCSF faculty and staff this means partnership with your DPH counterparts and DPH sponsor is essential to accessing your EIG funding. **Direct reimbursement from the Foundation is no longer allowed.**

A new requirement for all ZSFG and DPH grants is the applicant's completion of a Proposal Notification Form (PNF). The PNF facilitates review and risk assessment of all grant proposals by Executive leadership and initiates the grant Accept and Expend (A&E) process with DPH's A&E Unit. If you are unsure of how to respond or complete any of the PNF sections, please have the DPH Sponsor contact james.glik@sfdph.org (and copy grants@sfgfhf.org) for assistance and attach your draft PNF. Reference "2025 EIG PNF" in the subject line.

The PNF needs to be completed by your DPH sponsor and submitted with the application in Word format. Please do not attach it as a PDF.

DPH Sponsor responsibilities

The DPH sponsor will manage the budget and help ensure that the project is a success. The DPH sponsor will handle the procurement, measures overall grant outcomes and metrics for reporting; and reports on grants status and updates to the Executive Sponsor. The DPH sponsor is a DPH employee at ZSFG that has some level of authority and responsibility for the program/project's success, with approval/signing authority.

	DPH Sponsor	Executive Sponsor
Definition	ZSFG, DPH employee who: <ul style="list-style-type: none"> • Leads the grant proposal submission; • Completes the A&E documents; • Manages the grant work; and • Is the point of contact for grant questions. 	ZSFG Executive who reviews and approves grant proposal submission and oversees grant work.
Accept and Expend (A&E) Role	Fills out A&E paperwork: Grant Resolution Information Form, Ethics Form, & Budget.	Oversees and approves completed information packet, prior to submitting to DPH Finance.
Present at Board of Supervisors Meeting (if needed)	The DPH Sponsor may present at the Board of Supervisor meeting if approved and delegated by the Executive Sponsor.	Presents grant proposal information and serve as point of contact for grant questions. Executive sponsor may delegate this role to DPH Sponsor.
Grant Management role	The DPH Sponsor: <ul style="list-style-type: none"> • Manages the grant budget; • Handles procurement; • Measures overall grant outcomes and metrics for reporting; and • Reports on grant status and updates to the Executive Sponsor. 	Oversees all grant improvement work and removes barriers, as necessary.

Salary/Faculty Time

This grant cycle can include a portion of the staff and physician time in the project budgets, with the below considerations.

- No hiring new staff for DPH and UCSF.
- A fraction of time for short-term projects is allowed, no more than 50% FTE.
- Only include physician time or UC staff already working at ZSFG and on the Affiliation Agreement. For example, no UC Data Analyst or other UC positions that are not already working on campus. This will be reviewed and approved by the Executive Committee.
- For DPH staff time, you will need obtain your manager/supervisors' approval. The approval will depend on the staff and department needs and to avoid the need for a temp to cover the time that might be dedicated to an EIG project.

How to access your funds

DPH

Once approved through the city's Accept and Expend process, chartfields will be provided by ZSFG Accounting. Please work with your DPH sponsor to submit your expenses through ZSFG.

Procurement of services/supplies must follow City & County of San Francisco (CCSF) policy and procedures. There may be restrictions and requirements related to certain purchases such as employee recognition, drinks/food, travel, etc. For questions about the CCSF policy, accounting process and requirements, please email: dph-zsfgh.accounting@sfdph.org.

The DPH sponsor will be responsible for signing off on the expenses submitted through ZSFG procurement.

UCSF

Budgets that include UC faculty time will go through the Affiliation Agreement. Departments will be notified of the new UCSF project ID number for your EIG project. Please work with your department's finance point of contact to charge these expenses to the project ID and flexfield, as applicable.

Other budget items will need to be processed through ZSFG procurement. Contact your DPH sponsor to start the procurement process listed below.

What is the procurement process for DPH?

Policy and Procedures for Procurement from City Registered Vendors

Policy: Procurement activities within the organization will exclusively be conducted with vendors registered with the City.

Procedures:

1. **Identification of Services or Materials:**
 - Identify the required services or materials and supplies to be procured.
2. **Verification of Vendor Registration:**
 - Contact Materials Management or Accounting at dph-zsfgh.accounting@sfdph.org to verify if the supplier is registered to do business with the city.
3. **Requisition Submission:**
 - Fill out the requisition in PeopleSoft, following the same process as for other procurements.
 - For assistance, contact Materials Management.
4. **Chart Field Information:**
 - If additional information about chart fields is needed, contact accounting at dph-zsfgh.accounting@sfdph.org.
5. **Requisition Approval:**
 - Obtain approval for the requisitions in the system.
 - Once approved, the system will route the requisition to Materials Management for the creation of Purchase Orders (POs).
6. **PO Creation and Supplier Notification:**
 - Once the PO is created, the buyer will forward it to the registered supplier.
7. **Order/Service Receipt:**
 - Receive the ordered goods or services as per the PO.
8. **Invoice Processing:**
 - Upon receiving the invoice for the services or supplies, verify that the services/supplies have been received.
 - If received, approve the invoice for payment.
 - Forward the approved invoice to the accounting department for processing.

How does a vendor register to be a City-approved vendor?

If the vendor would like to be a compliant city vendor, they can register below with some basic information such as Tax ID or SSN, declaration of the business tax status, 12b compliance, etc.
<https://www.sf.gov/step-by-step/become-city-supplier>

Are gift cards allowed?

As of 11/7/23 gift cards are no longer allowed through the Affiliation Agreement, which means UCSF cannot purchase gifts cards for a Foundation funded grant.

DPH budgets may include gift cards, if evidence-based, and if DPH requirements and CCSF guidelines are met. Additional approvals are required, along with program tracking of gift cards. If your DPH Sponsor agrees with the gift card expense and the program meets the Evidence Based criteria, please contact ZSFG accounting for additional guidance at dph-zsfgh.accounting@sfdph.org

Gift Card Process:

Major Steps	Details
ZSFG can work with a DPH Buyer from OCA (Office of Contract Administration) to purchase gift cards through an approved City vendor	Requestor review and sign following documents: 1) DPH Wide Gift Card Policy 2) Gift Card Program Certification Form
Requestor sends Funding Certification to ZSFG Accounting for review and approval	If using funds from a grant or gift, please email ZSFG Grant Accounting Supervisor: Demissie Mulatu demissie.mulatu@sfdph.org ZSFG Accounting: Yingying Wang (yingying.wang@sfdph.org)
Requestor obtains quote for gift cards from vendor	Contact approved City vendor for gift cards
Requestor sends all documents back to ZSFG Accounting for CON approval	ZSFG Accounting: Yingying Wang (yingying.wang@sfdph.org)

Receiver to communicate receipt/retrieval of Gift Cards to DPH Finance	Documentation of inventory receipt and distribution must include the name and signature of the receiving staff and corresponding date
Receiver is responsible for Gift Cards distribution and documentation	<ul style="list-style-type: none"> • Maintain complete distribution records by gift card, gift card type, vendor and serial number, client name • Maintain log for clients/patients to sign upon receiving gift cards in person
Receiver submits Departmental Contract/Purchase Order and Release Input Form	Form signed and completed with supporting documentation, such as quotes, gift card inventory logs

Gift Card Separation of Duties: There must be a different person responsible at each stage for the handling and transfer of gift cards. In cases of inadequate staffing, the DPH program will explain on the gift card certification to request that the DPH program gift card custodian also handle other functions. DPH Fiscal Unit and Controller's Office will review and may grant exemption on a case-to-case basis. Any exemption granted is subject to annual review.

Taxi Vouchers, Muni and Bart Passes/Tokens

Like gift cards, the DPH program must complete the taxi voucher certification form and sign off on the taxi vouchers policy.

When ordering Bart and Muni passes/tokens for patients, the end user/program must have a valid purpose and use a log tracking when and who they issue the passes/tokens to, like the gift card process.

Conferences/Trainings and Travel

* Currently there is a Citywide policy on overnight and air travel expenditures, which also applies to UCSF expenses reimbursed through the Affiliation Agreement. With few exceptions including Travel being required by grant funding. This may be approved if travel is deemed a crucial part of your project.

*Subject to change and additional review.

DPH: DPH employees may be reimbursed for conference registration and travel costs. Employees must first complete a travel/training authorization form before the event. After attending the conference, employees will need to submit an expense report in the portal and seek reimbursement using the correct funding source (Your EIG project chart field, provided by ZSFG

Accounting). John Zeng (DPH) john.zeng@sfdph.org oversees the reimbursement process, and he can provide guidance to the employees.

Note: Each employee must pay out of their pocket first and seek reimbursement later; one cannot pay for other employees.

Otherwise, the conference registration fees can be purchased through the ZSFG procurement process if the organization is a city approved vendor.

UCSF: Faculty and staff may be able to include conference and travel expenses. These expenses will need to be approved during the ZSFG Executive Committee review and approved by UCSF, following any applicable policy.

What is the grant period?

The 2025 Equity and Innovation grant period will be up to 24 months. The grants will be awarded by October 2025; and the grant period will start March 1, 2026, and end February 29, 2028. The grant period will allow time for the funds to be approved through the city's Accept and Expend process, prior to the grant start date. The grant report will be due 30 days after the grant end date.

UCSF and DPH Points of Contact

Angelica Journagin- Chief Administrative Officer ZSFG
angelica.journagin@sfdph.org

James Glik- Senior Administrative Analyst, Grants and Gifts
james.glik@sfdph.org

Laurae Pearson - UCSF Associate Dean, Administration and Finance
Laurae.Pearson@ucsf.edu

ZSFG Accounting
DPH-zsfgh.accounting@sfdph.org

Materials Management
DPH-ZSFG.MATERIALSMGMT@SFDPH.ORG