

A Grant Manager's Perspective

A Grant Funding Strategy

Presented by

Wanda M. Whitehead, Manager

City of Tallahassee Grants Management Office

850.891.8724

Wanda.Whitehead@talgov.com

The Grant Funding Landscape

- The total amount of federal spending on grants has grown from \$7 billion in the 1960's to \$614 billion in 2015
- The amount of grant money awarded from private foundations and other non-profits is estimated to be as much as \$300 billion per year

Grant Funding Landscape

- In all, there was over \$900 billion in grant funds available to local governments in 2016
- In the face of increased liabilities and expenditures, and slowing revenue growth, grant funds can be a revenue source



Where to Begin?

- Pursuing grants and managing grant awards without planning and training is a key driver behind the reluctance to pursue grant funding
- When you add work to support grants without planning or training, it becomes another thing staff must manage without the proper time and resources to be successful



Understand Grant Economics

- Grants cost money to pursue and manage
- Not understanding the cost drivers may lead to deficits in resources
- Understand the mechanics and benefits of pursuing and utilizing grant funds as an alternative funding source



Reasons to Have a Strategy

- In 2013-2015, eCivis, a leading cloud-based grants management company conducted a review of dozens of local governments, with grant portfolios ranging from \$100 million to \$2 billion, to evaluate their grant acquisitions and management strategies
- They identified three key characteristics that made these local governments effective in securing grant awards, reducing costs and achieving the goals and outcomes of each funded project. Those characteristics are: transparency, established policies and centralized support

Key Characteristic #1 - Transparency

- Agencies effective in securing grant awards have systems in place to track information and activity
- These systems help identify what projects can be grant-funded and promote internal information sharing and collaboration

5 Ways to Create Transparency

- 1. Align projects with funding sources –**
departments can create specific grant acquisition goals for current and future projects during the budgeting process using information related to open/active grant projects.



5 Ways to Create Transparency

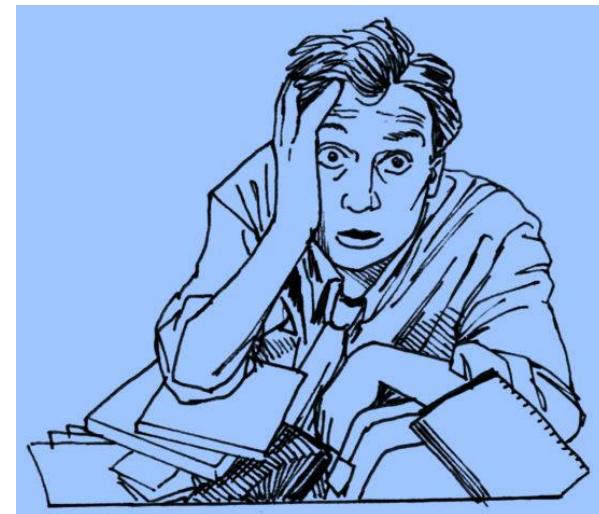
2. **Track activity** – Establish a process to track grant activity, including calculating costs and evaluating resource requirements. The more areas of the process you can measure activity, the better the outcomes will be.



5 Ways to Create Transparency

3. **Align grants process with business process-** When creating a budget for your grant application make sure the proposed costs to the funder can be tracked and reported through your current procurement and accounting processes

If you don't create this alignment, you'll create reporting challenges ... and increase administrative cost to keep track of spending.



5 Ways to Create Transparency

4. Improve the sourcing of your funding information

- Use resources that give your staff access to more grants and also provide information to help make decisions faster
- Identify and use key grant information (eligibility, financial criteria, contact information, recent updates, etc.) to help you determine if you will pursue a grant

5 Ways to Create Transparency

5. Enforce good policy-
avoid pursuing and
accepting grants that
do not align with the
fiscal needs of your
organization

- ✓ Systemize & communicate what grants are being applied for to leadership and key staff
- ✓ Include Finance early in the grant proposal budget development process

Key Characteristic #2 - Established Policies

- Policies need to be in place to ensure proper administration of grant activities
- Grant policies allow staff to focus on improved alignment with strategic initiatives and cost considerations
- Good policies provide clear requirements and ownership, leading to better assignment of duties, less staff frustration and increased cost savings

Keys to Creating Good Policy

1. Manage the grants you pursue

- Have a process to review grants prior to committing time and effort toward a grant proposal
- Let your budget and resources determine what grants to pursue

Keys to Creating Good Policy

2. Bring the Finance team into the process early to align reporting elements
 - They can eliminate the work related to gathering data and reorganizing that data for the funder later
 - Time saved in reporting outweighs the amount of time it will take to align the reporting elements before a grant application is submitted

Keys to Creating Good Policy

3. Track performance

- Track departmental performance to improve performance
- Metrics like win rate is a common performance metric that can help support the sharing of best practice across departments to improve performance

Key Characteristic #3 - Central Support

Centralization allows leadership to assess matters in real-time, and helps managers across the organization strategically plan their grant acquisition strategy around need, capacity and planned resources.

Advantages of a Centralized Process

- Certain resources and processes are streamlined to eliminate duplication of effort, which reduces costs and improves capacity within each department
- Reporting and communication is more uniform and leadership has a single point of contact
- Departments can go to one place for training and support, transparency and accountability are high in this structure

Disadvantages of a Centralized Process

- Departmental needs can become secondary if not communicated well
- Knowledge sharing can become challenging
- Some departments may be resistant to institutional knowledge sharing

Best Practice Tips

- ✓ High-performing local governments that have good information at the beginning of the process, before a grant is pursued, avoid the traditional challenges that others face later such as managing costs after a grant is accepted
- ✓ More time focused on the beginning of the grant process, provides earlier access to information, which leads to better, more informed decision making
- ✓ This helps achieve the desired outcome of increased funding and reduced costs

Best Practice Tip

- ✓ Roughly 80% of federal grants are re-solicited each year
- ✓ Anticipating future solicitations will give you more time to find the right grant and develop a strong proposal



Grant Funding Strategy Takeaways

Strategies to Increase Grant Funding:

- 1. Increase Funding Scope-** go after foundation funding
- 2. Establish Public – Private – Partnerships (P3)**
- 3. Improve Strategic Planning –** 80% of federal grants are resolicited each year. Don't wait to start an application when the notice of funding availability is released. Use older notifications to find future funding that aligns with your project

Grant Funding Strategy Takeaways

Strategies to Improve the Management of Existing Grant Funds:

1. **Tools** – Modernize your systems to improve management and remove the danger of institutional knowledge of one person being your only resource.
2. **Process Alignment** – align grant process with business process.
3. **Identify ‘Good’ Projects** – find projects that are strategically aligned with the grant program. This will help with resource alignment.

Free Resources

[USASpending.gov - TREAS](#)

USASpending.gov is a single, searchable website accessible to the public listing information about every Federal award, as required by the Federal Funding Accountability and Transparency Act (FFATA) of 2006.

The Grants Learning Center is your gateway to the federal grants world. Blog.Grants.gov and Twitter (@grantsdotgov).

[Grant Systems](#)

Tools & apps to register, apply & administer grants

[Grant Programs](#)

General financial assistance, benefits & opportunities

[Grant Reporting](#)

Learn about grant reporting, monitoring & oversight

OMB Uniform Guidance

Review the [Uniform Guidance](#) page or watch the [COFAR training webcasts](#) for the latest grants guidance.

Policy Timeline

[Office of Management and Budget Uniform Guidance \(2014\)](#)

[Executive Order 13576 \(2011\)](#)

[Federal Funding Accountability and Transparency Act \(2006\)](#)

[Single Audit Act Amendments \(1996\)](#)

[Federal Grant and Cooperative Agreement Act \(1977\)](#)

[DATA Act \(2014\)](#)

[American Recovery and Reinvestment Act \(2009\)](#)

[Public Law 106-107 \(1999\)](#)

[Lobbying Disclosure Act \(1995\)](#)

Free Resources

U.S. Department of Housing and Urban Development

HUD publishes a General Section each fiscal year that contains requirements for all applicants to HUD's various competitive grant programs.

Copies are available at [Grants.gov](https://www.grants.gov) and [HUD's Funds Available](#) page.

- Council on Financial Assistance Reform (COFAR) resource page: <https://cfo.gov/cofar/cofar-resources/>. Resources on transparency and the Uniform Guidance.
- Grantscase: www.grantscase.com. Grant training and pre-award and post-award resources.
- eCivis Resource Library: <http://www.ecivis.com/resource-libraryhtml>. Guides, templates, and videos related to grant management best practices and grant writing