

# 7 KEYS TO SELECTING THE RIGHT GRANTS MANAGEMENT SYSTEM



Grants provide critical funding to local governments, and during times of fiscal constraints the need to pursue grant funding can become even more critical. In some local governments, grant funding accounts for as much 28 percent of the total fiscal year operating budget. So how do you find a grants management system that helps you pursue grant funding and manage your grant awards?

You can start by assessing your challenges. Surprisingly, the grant funding challenges that local governments face are very similar. Though each local government is unique, the size of a local government plays a much smaller part in grants management than other functional areas of local government. The primary difference is the scale at which grant-related challenges are applied and addressed.

To help local governments identify key requirements of a grants management system, we have provided some examples from several large cities and counties across the nation. These requirements were compiled from RFP solicitations and sole source awards provided by these local governments. Each example provides a list of features that would be valuable to any size local government seeking to increase grant funding.

## Grants Management System Requirements

### City and County of Denver

Denver manages between 200–250 active grants, and approximately 20–25% of the City's budget is grant funded. The City required a grant management system with the following goals:

- Implement a comprehensive grants management system with functionality including grant research, solicitations, process workflow, award management and tracking outcomes.

Agencies will use the system to research and select grants and initiate the pre-award process workflow

- The solution should be integrated with PeopleSoft/Workday to allow transfer of award information into the agency's budget and track spending.
- Improve compliance with Fiscal Accountability Rule (FAR) 9.1 to 90%.
- Maximize grant funding with more effective and user-friendly grant research tools.
- Better manage the entire grant process from research to post award functions and monitoring via automations and enhanced management reporting (e.g. win rates, grants by agency, grants by funder, etc.).

### City of Miami

The city wanted a system to manage its pre-award and post-award activities in one place. They specifically wanted a grant management system to help drive the following:

Each example provides a list of needs that would be valuable to any size local government seeking to increase grant funding.

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- Local grants and funding;
- Solicit grant applications or track pass-through funding to sub-recipients, in order to monitor the outcomes of grant applicants and awardees;
- Centralize all grants management processes through a single system, to allow tracking and reporting on all grants management requirements;
- Manage performance outcomes easily, and be able to view available funding balances and share outcomes through a standard or custom reports;
- Track the history of completed tasks real-time;
- Assign recurring or nonrecurring tasks to individuals, groups or Citywide;
- Send grant funding opportunities to other City department users, apply for grant funding with other departments, and allocate the award as needed;
- Minimize data entry and improve usability through simple integrations to the City departments' most widely used systems;
- Improve compliance by mapping internal policy and procedures to task and approval workflows; and
- Interface with City's Oracle system with minimal Information Technology support

## City of Detroit

Following its bankruptcy, the City of Detroit sought a grants management system that would support improved, compliant accounting practices and enable accurate, timely reporting. The system would have an intuitive user interface, support grants management best practices, utilize current technology, enable expedited implementation, and integrate with the city's current and future financial systems, Oracle. [Read more about Detroit's technological turnaround.](#)

## Harris County, TX

Harris County is the nation's third-largest county by population. The County wanted a vendor to provide a turnkey enterprise grant tracking and management software system for the Harris County Budget Management Office, other County departments, and component units (Hospital District, Flood Control District, and Toll Road Authority). The objectives of the system were to improve comprehensive grant reporting by the County, track the County's success rate in obtaining

grants, identify grants available to fund projects, track expenses on a grant and department level basis, monitor grant deadlines and deliverables, and establish an audit trail for all grant activities. The grants management system was also required to perform the following key tasks:

- Search and allow access/submission to all available governmental and private foundation grants (updated frequently).
- Allow access to a database of previously accepted grants submissions for review purposes.
- Ability to track in detail the actual costs expended compared to the grant budget for an unlimited number of grants (or at a minimum 750 open grants at a time).
- Ability to track expenditures vs. time remaining on grant(s).
- Ability to integrate reimbursement, expense, budget, and performance metric data from one, or many, sources to the grant software.

[Read more about Harris County's grants management success.](#)

*“The objectives of the system were to improve comprehensive grant reporting by [Harris] County”*

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## Key Grants Management System Selection Criteria

Based on the requirements of these local governments and the input of dozens of more across the country, we've compiled 7 keys to selecting the right grants management system.

**1. Experience with Local Governments.** One of the most important aspects of the local government procurement process is ensuring that vendors have the necessary experience. No local government buyer wants to procure and implement software that doesn't work. When purchasing a grants management system, make sure the vendor has good references and a history of successful implementations among local governments.

**2. Simplicity.** A grant management system that requires excessive data entry, or is overly feature-rich, requires you to enter too much data and decrease the chances of user adoption. You'll also pay for features that your end users will likely never use. Look for intuitive systems that integrate with your existing system of record (SoR). A grants management system that integrates with your financial system allows you to manage both programmatic and financial grant data and eliminates opportunities for duplication of effort. Entering data such as time-and-effort and other financial data that is already in your ERP or financial system is duplicative effort. Look for vendors that can provide references in this area so you can properly plan.

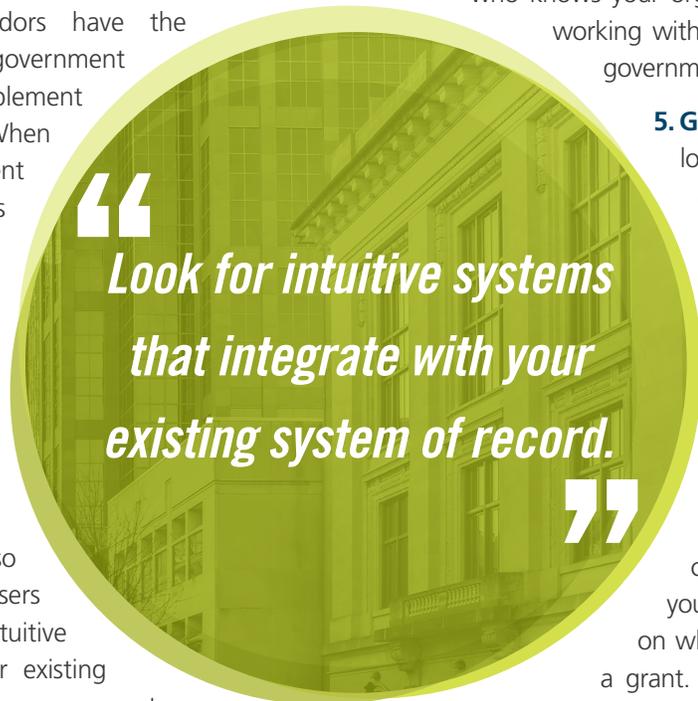
**3. User Adoption.** The best grants management systems focus on effective implementations that lead to high user adoption. These systems dramatically improve a local governments' time to value (TTV). The faster users are able to find highly relevant grant funding, the faster a grants management system can achieve TTV. Experience grants management vendors will

support the migration of existing grants data and files into their system to achieve maximum results.

**4. Customer Support.** Ask your vendor about their customer support. How do they provide technical support and training and address ongoing questions? Is the cost of support included, or is there an additional cost? Do they include onsite training? The best grants management systems will provide dedicated support so your department(s) and users deal with someone who knows your organization and is experienced working with grants management in local government.

**5. Grant-Seeking Support.** Most local governments interested in a grants management system are committed to increasing the amount of grant funding being pursued. A complete grants management system will include features that allow you to easily find relevant grant opportunities, but more important is the need for critical data to be accessible for you to make informed decision on when and if you should pursue a grant. Your system should manage tasks, create approval workflows, and provide grant application development tools to develop narratives, calculate indirect costs, create pre-award budgets and assess the true cost of a grant.

**6. End-to-End Grants Lifecycle Support.** Some local governments act as a pass-through entity, meaning they serve as both a grantor and grantee, and small local governments have opportunities to work with community-based organizations. A comprehensive grants management system will allow local governments to manage both grantor and grantee activities in both the pre-award and post-award phases of a grant. Also, look for a grants management system that can map to your internal policies and procedures, or even help you create them.



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**7. Continuous Improvement.** The top grants management systems will respond to customer needs and adapt to federal and state requirements quickly. Look for grants management systems that have a history of system improvements and experience dealing with changes in federal requirements over the past several years. Such systems will have a demonstrated track record of dealing with emerging needs from ARRA to the Uniform Guidance (2 CFR 200). Ask local government references how often changes and improvements are made to the system.

If you are in the process of selecting a grants management system for your local government, or plan to include the cost in a future budget cycle, use these seven keys to formulate a good review process. To learn more about other local governments using grants management systems, visit [www.ecivis.com](http://www.ecivis.com).



eCivis is the leading cloud-based grants management system in the nation for state, local, and tribal governments. Our innovative solutions address both programmatic and fiscal grant funding requirements throughout the grant lifecycle, helping clients easily overcome the challenges and heavy workload that come with finding and managing grants.

For more information about eCivis, visit [www.eCivis.com](http://www.eCivis.com)