

# EXCELLING BEYOND THE SPREADSHEET: FY 2016 and Beyond



For decades, spreadsheets such as Microsoft Excel have been used to organize, track, and store data. And while spreadsheets can easily address basic reporting needs, they become complicated and difficult to update when managers, government leaders, and citizens seek deeper insight. In today's digital, connected world the consumption of data simply exceeds the capabilities of spreadsheets.

But it's not just the limitations that should concern you. Beyond the difference in capabilities, it's the cost to update and maintain spreadsheets that really hurts organizations. While spreadsheets are useful for reporting on grant activity, they are incredibly expensive to maintain. Many of our clients used to spend days—some weeks—creating reports to determine performance, budgets, and overall grant utilization. This consumption of labor hours and strain on human capital is often missed or ignored because it's simply always been done that way.

If your department or organization has ever missed deadlines, received audit findings, failed to fulfill funding requirements, had to return grant money, or simply doesn't keep sufficient records of grant activity, it might be time to move on to a complete grants management system for managing your award funding. Here are some red flags to watch out for:

## 1 Grant funding has been mishandled or returned

This is the primary reason that government agencies seek post-award grants management solutions: They've failed to efficiently drawdown funding, they've had to return thousands or millions in unspent grant dollars, or they've put future funding in jeopardy because of mismanagement. A centralized software source allows multiple users to handle funding with accountability and transparency.

## 2 Senior management has trouble answering basic grant-related questions

Does your finance team know how your departments are managing grant funding? Are your eligible costs identified and documented adequately? Is management confident that their procedures can detect noncompliance before it becomes a significant issue? If these questions cannot be answered, it might be time to look into a better organizational tool.

## 3 Preparing spreadsheets is a time-suck

Simply put, duplicate entry and reconciliation to a general ledger are time-consuming aspects of the accounting process. A robust grants management system can integrate with your ERP system, allow for multiple users to see activity, and provide management a lens into departmental grant activity.

## 4 Your grant specialist left

When your "Excel specialist" leaves your organization, their departure leaves your organization vulnerable to losing alternative funding sources through grants. With a grants management system in place, your grant activities remain transparent and accessible despite employee churn.

# EXCELLING BEYOND THE SPREADSHEET: FY 2016 and Beyond



## 5 You're a high-risk auditee

Studies show that high-performing, low-risk grant auditees often have had grants management training for staff responsible for grants management. A grants management system can maintain an audit trail while keeping you on track and ahead of the game.

## 6 Your spreadsheets have raised grantor eyebrows

Some funding agencies want to ensure that you have a proper grants management system in place. Having only a spreadsheet to manage multiple grants could put your organization at risk for losing funding.

## 7 Your organization is decentralized and lacks transparency

A transparent grants management system allows you to assign grants to personnel, track grants and updates, follow reporting deadlines, and ensure that no two departments compete for the same grant money. Without such a system in place, it is difficult to track which reports have been submitted, especially among multiple departments.

## 8 You lack a "go/no-go" process

You don't want to chase after funding you're not likely to win. With a grants management system, the grant approval process

for multiple departments can be streamlined and centralized: A primary account holder can give the yay or nay to pursue a grant opportunity, allowing an organization to check and balance itself, saving time and effort.

## 9 You handle more than a handful of grants at any one time

A spreadsheet can help you track the numbers and con-tacts, but the whole grant life cycle requires a real-time, easily accessible system to keep your team on top of reporting requirements, and keep things transparent within your organization and with auditors.

## 10 Your financials and programs are not on the same page

A grants management system puts your programmatic work in line with your accounting—crucial for your audits, and a huge relief for employees. Cloud technology helps to integrate your financial system with your grants management system.

Do you identify with one, two, or five of these red flags? Make note of them and consider how your organization might benefit from a grants management system. Some organizations are perfectly happy with using spreadsheets for the several grants they manage yearly. But in our experience, if you're handling more than five grants—and if your organization has suffered financially due to a lack of transparency and accountability—you'll want to research grants management software and determine what's best for your organization. Depending on your position, you may want to provide your supervisor with the research to help them make an informed decision. And depending on your grant activity, that decision could save thousands or even millions of dollars in grant funding.



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)