



The availability of several major funding sources through the Coronavirus Aid, Relief, and Economic Security Act, the American Rescue Plan Act, and the Bipartisan Infrastructure Law provide great opportunities for state and local governments. They have also introduced enormous pressure, requiring state and local governments to maximize their funds with limited administrative resources and ever-changing eligibility guidance.

The stakes are high in grants management. Fund recipients must coordinate amongst various subrecipients to meet strict and burdensome compliance requirements. Failure to satisfy grant requirements can lead to de-obligation of funds, which can be detrimental to the local economy in the long term.

Grants management technology solutions can help state and local governments develop a more organized and efficient process for preparing, managing, and reporting grants.

# Grants Management System: Leveraging Technology Solutions for Effective Grants Management

## Key Considerations for Effective Grants Management

When the process for grants management is fragmented, redundant, and burdensome, the results are neither cost-effective nor resource-efficient. It is critical that organizations develop a process for managing grants that is streamlined, consolidated, collaborative, and transparent.



**Streamlined Process:** Too often, staff members maintain their own unique process for managing and preparing support documents. Standardizing document storage, versioning, packaging, and reporting for grant management within an organization can significantly reduce the risk of inaccuracy, inefficiency, and noncompliance.



**Consolidated Reporting:** Sourcing information from fragmented reporting systems presents a major challenge for effective grant management. These challenges are further compounded whenever organizations manage multiple grants simultaneously. Aggregating financial data from different sources into one consolidated reporting tool can help simplify and even automate an organization's reporting responsibilities.



**Scalable Collaboration:** Coordinating federal grants is complicated and requires both inter- and intragovernmental collaboration between numerous stakeholders, each with their own organizational structures and missions. Centralizing communications through digital, cloud-based systems allows organizations to promote collaborative workflow while staying adaptive to a dynamic funding landscape.



**Transparent Information:** Increasing the transparency of grant determinations and progress can help connect and inform grant managers, recipients, and the general public. Organizations that successfully tailor reports for different audiences, without compromising the varying levels of access to information, experience better stakeholder engagement and informed decision-making from all levels.

## Grants Management Technology Systems

Customizable and integrated grants management technology systems should prioritize the needs of the different users that are critical to the grant management process: grant recipient, grant sub-recipient, and external stakeholders including state and local government officials.



Guidehouse's technology solutions capabilities not only help develop grants management tools that streamline processes and enhance organizational effectiveness, but also improve reporting accuracy, compliance, and decision-making. We work with a wide range of state and local governments, as well as broader public sector organizations, to successfully design and implement grants management solutions.

Our experience partnering with public sector organizations and existing grants management solutions, paired with our recent acquisition of Dovel Technologies, a solutions provider with significant expertise and qualifications in advanced technologies, allows us to provide our clients with reliable and sustainable technology solutions that transform the way state and local governments prepare, manage, and monitor their grants.

- Performance Management and Tracking:** Rather than manually collecting and compiling key reporting metrics across different staff members, a grants management system facilitates the intake of information and automatically aggregates acquired data to inform planning and decision-making. The system should also allow this data to easily be exported for additional analysis in Microsoft Excel or other analytical software (i.e., R, Stata, Python).
- Centralized Document Repository:** Managing supporting documents and other files required for grant submissions can be incredibly tedious and time-consuming. A grants management system provides a one-stop-shop that securely houses all supporting documents, in addition to improving file organization, retention, and searchability. Additional features include rule-based retention, metadata tagging, version control, and bulk uploads/downloads.
- Business Intelligence and Collaboration:** Business intelligence features trigger user alerts whenever new activity is detected within the grants management system. Automated notifications for activities such as documentation uploads, data entry, and status reporting streamlines the process of tracking and monitoring grant progress. Additionally, action logs and other tracking features can ensure detailed recordkeeping and collaboration between different users.
- Automated Reporting and Dashboards:** Reporting tasks that summarize key performance and financial metrics can be scheduled to automatically run on a daily, weekly, or monthly cadence. Updated publications of these executive reports and dashboards can selectively be shared with different users within the system or via email. This feature significantly reduces administrative burden, improves reporting accuracy, and informs decision-making for stakeholders.
- Standardization of Business Processes and Workflow:** Grants management is a process-intensive task that involves approvals, workflows, business rules, and data validations. Automation of these tasks can help reinforce good user behavior, while eliminating deviations from established standard process. User-level tasking, time-based reminders, and process validation rules, to name a few, can significantly improve the workflow experience of staff members managing grants.
- Selective Access and Data Security:** System administrators designate varying levels of access to information and actions based on users' roles. Access can be customized in countless ways (i.e., public viewer, recipient user, grants manager, and system admin) to maintain data integrity, information security, and process workflows without excluding critical end users from the system.
- Ease of Configuration:** Thoughtful development of the system prior to deployment allows end users to implement changes to grant management processes and workflow with little to no technical support. The system can seamlessly adapt to fluctuating requirements and guidance.