Managing Performance as a Grant Maker

Making Sure the Cobbler's Children Have Shoes!

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REI Systems

Introductions

- Jeff Myers and Jason McGill

- How many of you are (by show of hands):
  - Grant makers, grant recipients, state, local, non-profit?

- Do you have an objective way to tell if a grant maker is doing a good job?
  - How? Who collects the info? Is there similarity across all of you?
  - Would there be a benefit to similarity across Maryland?

- One of our "mission-in-life" priorities is to strengthen performance of grant-makers – thus we are trying to define performance, and help create benchmarks for what good is

Purpose of this session

- Review a notional set of measures for grant-makers

- Ask if you have (or could easily gather) that information

- For those who have it at top-of-mind, explore / compare / discuss

- For those who would like to gather the info, and share back by the end of November, offer to share a comparison with your peers (you can decide whether you want your info attributed to you)

- Provoke your ideas about how to improve as a grant-maker (or what to ask of grantors from whom you receive funding)

Measure topics

1. Timely Grant Award Process
2. Cost to Administer Grants
3. Provide Information and Support Before Application
4. Focus on Performance
5. Minimize Burden on Grantees
6. Qualified Staff
7. Well-Managed
8. Use Appropriate Tools
9. Monitor grant recipients
10. Use Grant Funds Fully

Measure definitions

1. **Timely Grant Award Process.**
   - Average no. of days from receipt of a grant application to notice of award issue
   - Average no. of days from notice of award and to issue of first disbursement

2. **Cost to Administer Grants.** Total dollars of annual administrative spend (everything except the money granted), as a proportion of total dollars in annual grant disbursements

3. **Provide Information and Support Before Application.** Proportion of person-hours of support that your agency offers, in total to all applicants, prior to the deadline for grant applications (versus post application person-hours)

Measure definitions (continued)

4. Focus on Performance.

- Agency gathers grantee/beneficiary outcome data.
- Agency has adjusted program or provided substantive feedback to the beneficiary based on performance data.
- Agency has observed/achieved performance outcome improvements in two out of the last three years?

5. Minimize Burden on Grantees.

- Agency only asks grant recipients to provide basic information once (POC name, address, program description) across application(s), award acceptance, financial reporting, performance reporting, closeout, etc.
- Agency permits all grantee reporting over via electronic means
- Average response time to grant recipients questions.

Measure definitions (continued)

6. Qualified Staff.

- Total number of agency grant program employees, and number/percentage who are certified grant managers
- Number/percent of agency grant program employees holding at least a BS/BA degree.

7. Well-Managed.

- Your Agency's single audit produced an unqualified opinion (financial audit).
- All management letter / program issues raised in the previous audit were resolved and no longer identified as issues in the current audit.

Measure definitions (continued)

8. Use Appropriate Tools.

- Does/Do the grant management tool(s) that your agency uses provide the following key capabilities?
  - Accept grant applications over the internet
  - Support award notices and disbursement of funds
  - Interface automatically with your agency's financial accounting system
  - Provide reminders/notices to agency personnel when an action is needed/due
  - Collect program measures / outcome data

Measure definitions (continued)

9. **Monitor grant recipients.** For what percentage of grant recipients has the agency monitored grantee activity and evaluated performance by conducting an interactive site visit, financial review, or program review?

10. **Use Grant Funds Fully.** Over the previous five fiscal years, what is the average percentage of available grant funding that your agency has disbursed during the project period? (i.e., Has your agency returned a significant proportion of grant monies as unused, or extended project periods to make sure all funding is spent?)

Wrap-up

- Answer for yourself
  - Is my agency / my grant-maker doing a good job?

- Answer for us:
  - Are there other/different measures that would help me tell?
  - Would you like to share back with us the measure data for your agency, and to get a picture of where your agency falls in comparison to others who also share back?

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