AGENDA

- Introduction and Methodology
- About the Respondents
- Grants Lifecycle
- Systems and Data
- Training
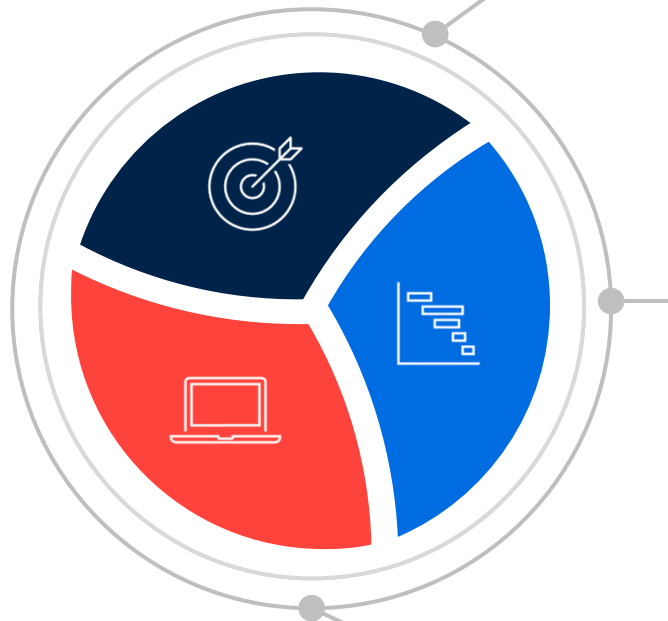- Success Factors and Challenges
- Key Takeaways

REI SYSTEMS

REI Systems, NGMA, and GWU Conduct an Annual Grants Survey 2016 - Present

→ **Keep a pulse on the Grants community**

→ **Identify issues and priorities**

→ **Look for opportunities for improvement**

→ **Help advocate for what you need**

Introduction and Methodology

Purpose

Inform the grants community of crosscutting issues and trends to **help improve** grants management and to **support advocates** for better grants management.

Survey Design

Collect both quantitative and qualitative data to identify key practices, major challenges, and related topics that could help inform the grants management community. Implement minor revisions annually to adjust to the changing environment. Maximize the opportunity to evaluate the trend of responses over time.

Survey Administration

More than 15,000 professionals in grants management and related fields were invited to take the survey online.

What are the Biggest Findings?

Many trends continued, while new legislation brings more challenges

DEIA being considered in every stage of the grant lifecycle

Technology challenges fueling demand for modern, affordable, and adaptable Grants Management Systems

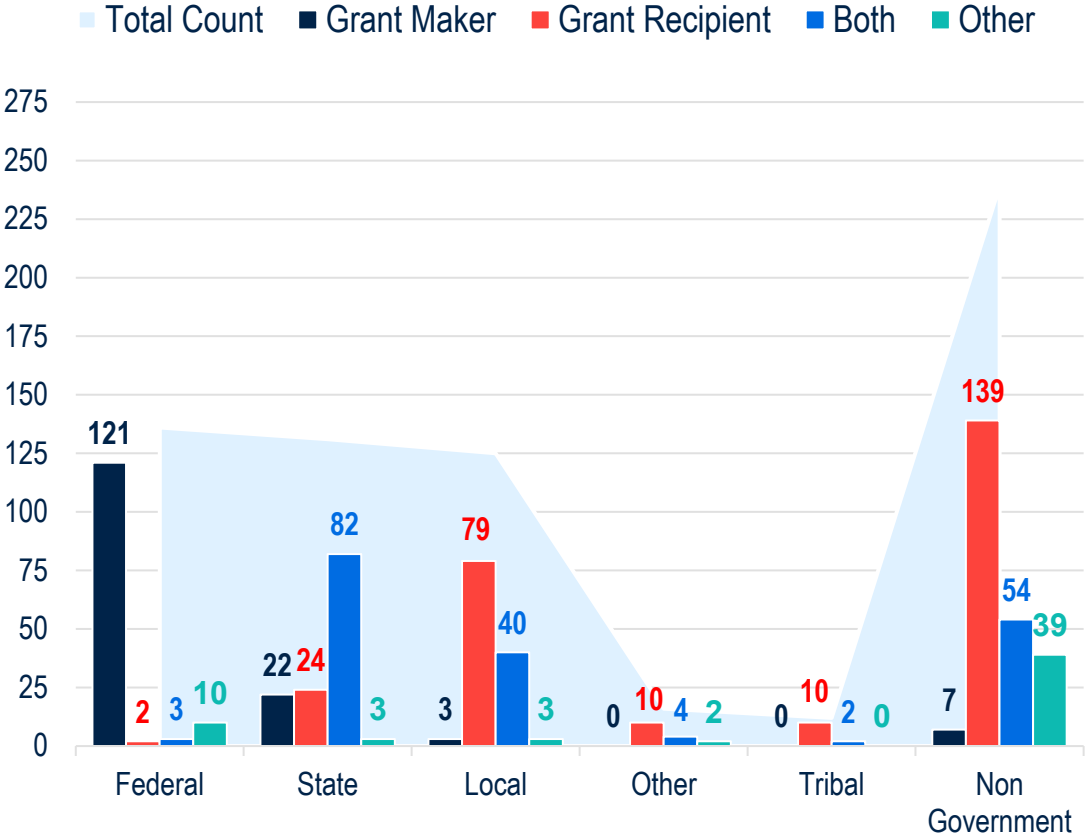**More standardization, simplification and automation needed to reduce burden**

Well-trained and capable staff key to success
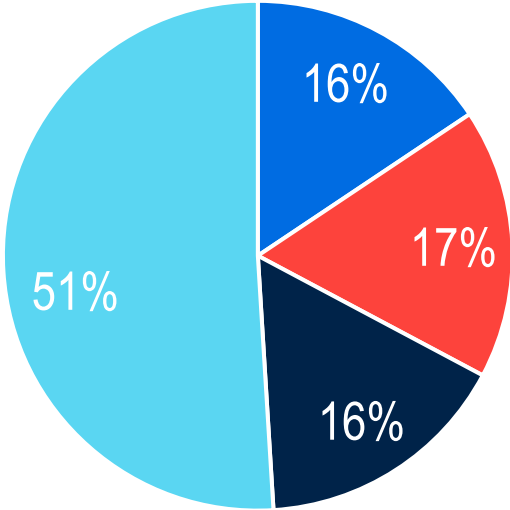
Survey Demographics

Respondents Included a Mix of Federal, State, Local, and Nonprofit Grants Managers

659 Responses

Legend: Total Count · Grant Maker · Grant Recipient · Both · Other

Category	Grant Maker	Grant Recipient	Both	Other
Federal	121	2	3	10
State	22	24	82	3
Local	3	79	40	3
Other	0	10	4	2
Tribal	0	10	2	0
Non Government	7	139	54	39

Years of Experience

Legend: 0-2 Years · 3-5 Years · 6-10 Years · More than 10 Years
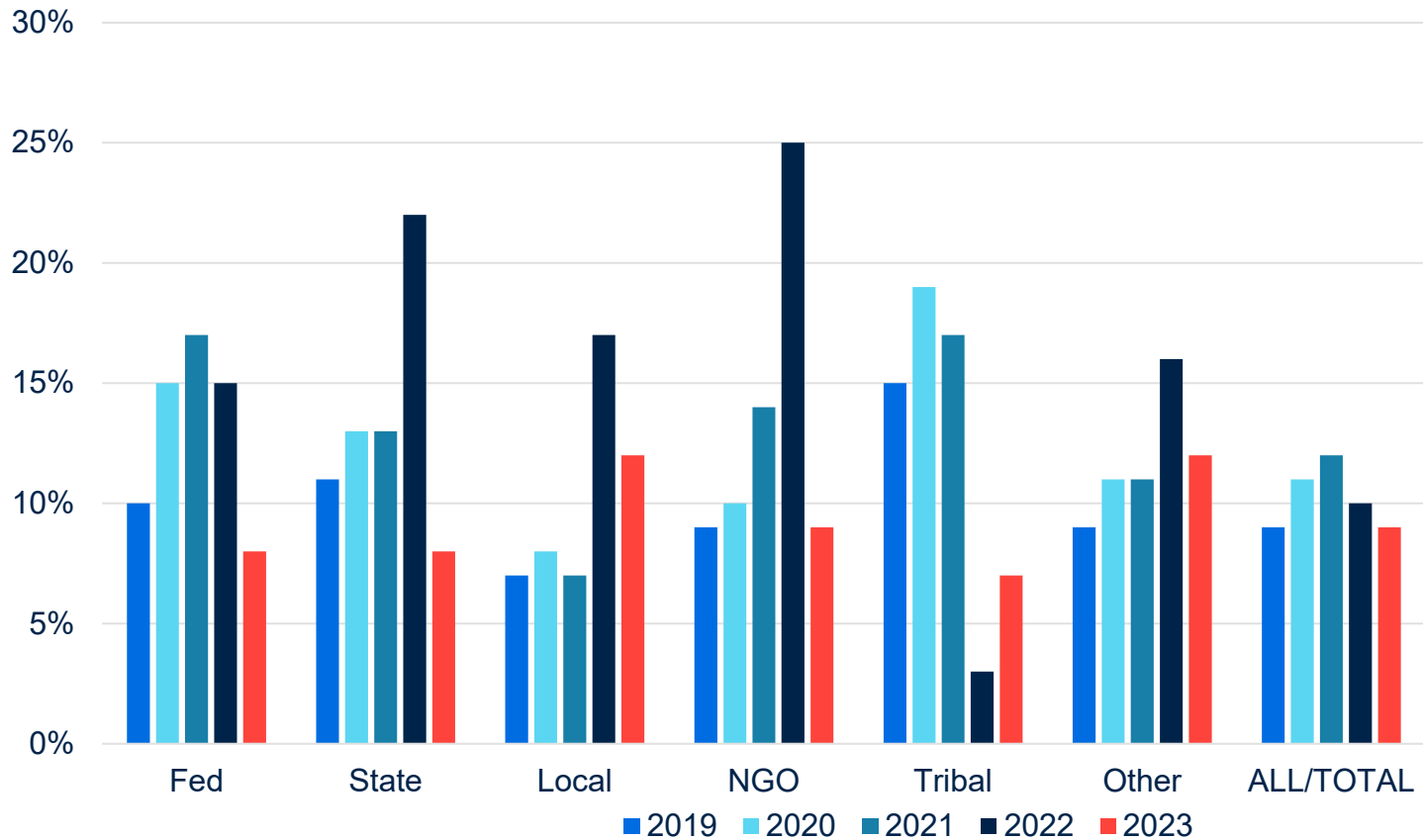
- 0-2 Years: 16%
- 3-5 Years: 17%
- 6-10 Years: 16%
- More than 10 Years: 51%

Admin Spend Improves for Many but Still Remains High

1.4. What percentage of the annual value of grants processed by your organization does [your organization's] administrative budget constitute?
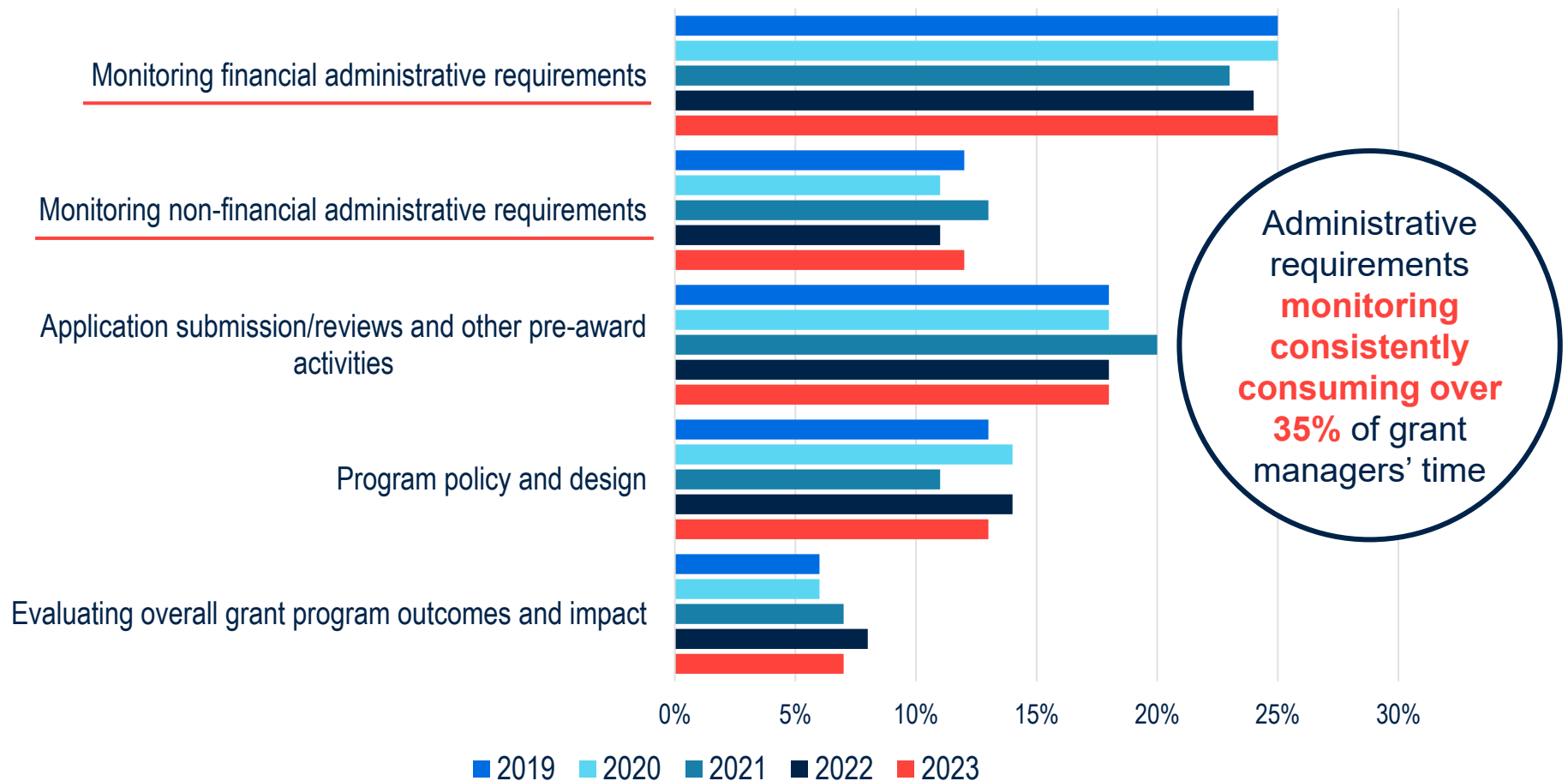
Admin spending as a percent of grant value

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Grants Lifecycle

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Grants Managers' Work Is Consistent:
The Biggest Task Is Still Compliance Monitoring

2.1. How much time do you spend on the following grants management activities?

Administrative requirements **monitoring consistently consuming over 35%** of grant managers' time

Chart categories:
- Monitoring financial administrative requirements
- Monitoring non-financial administrative requirements
- Application submission/reviews and other pre-award activities
- Program policy and design
- Evaluating overall grant program outcomes and impact

X-axis: 0%, 5%, 10%, 15%, 20%, 25%, 30%

Legend: ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023
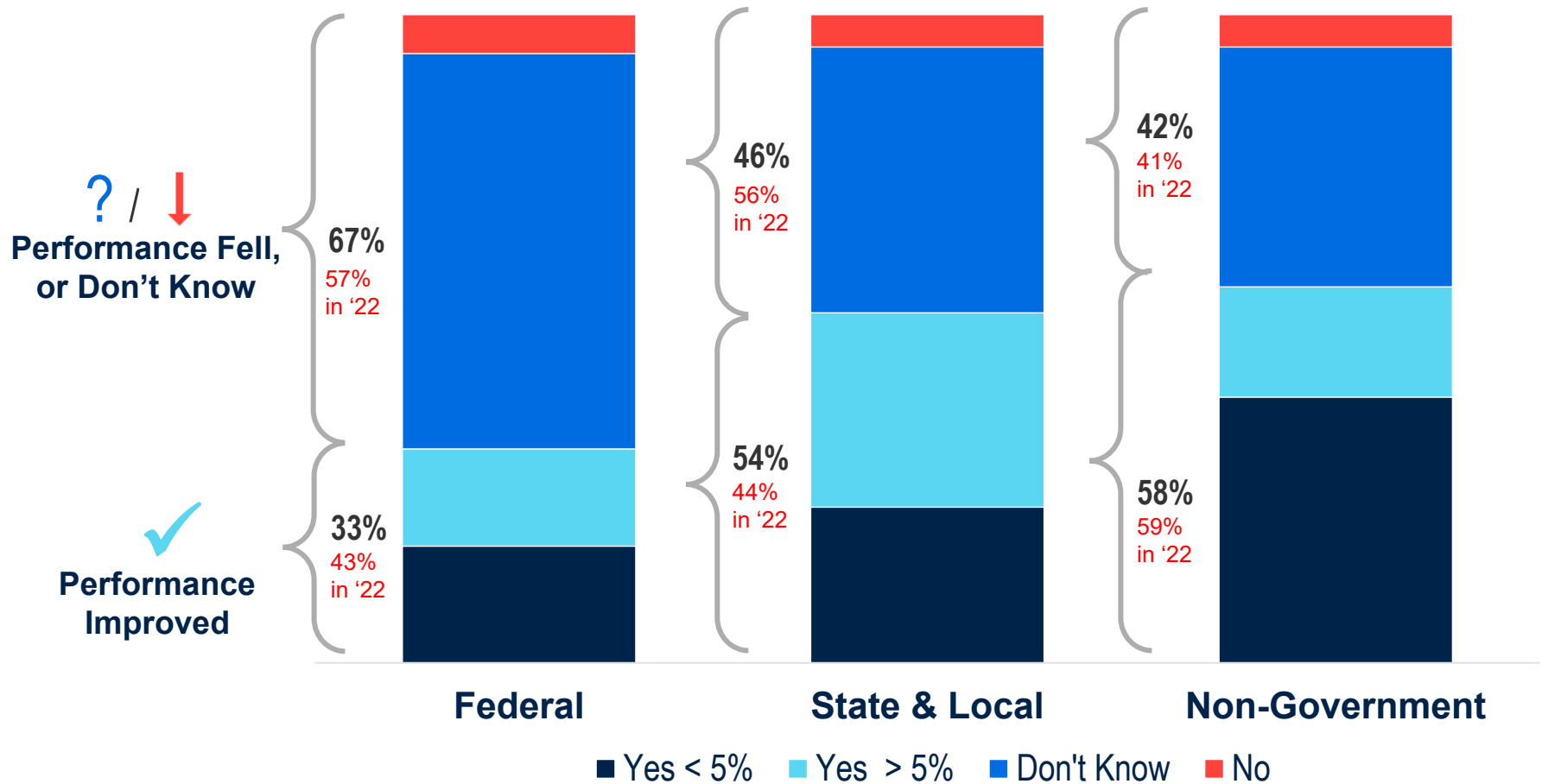
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Organizational Ability to Meet Mission Objectives Remains High

2.2. What is your assessment of how well equipped your organization and its operational environment is?

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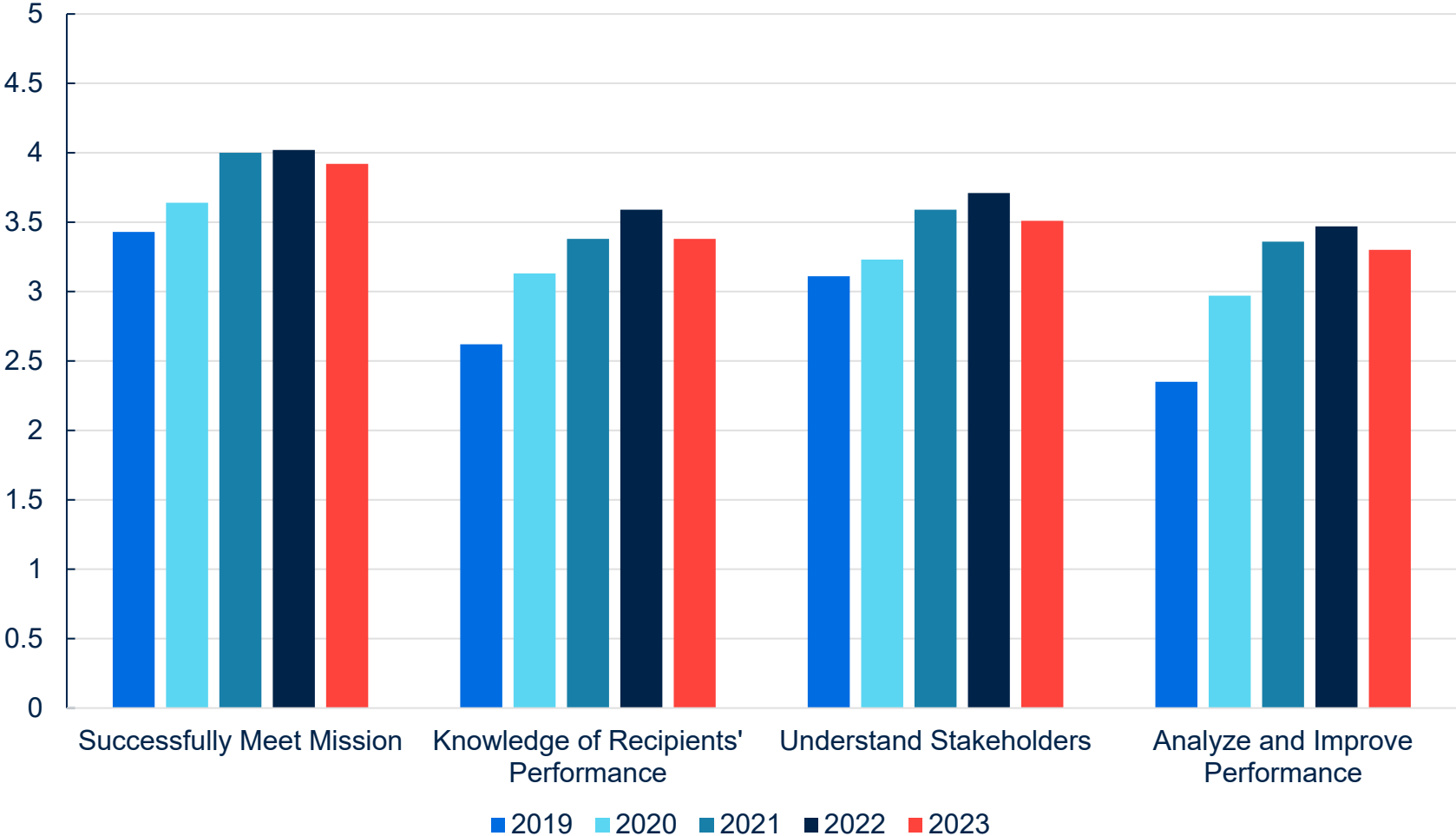
Agencies Struggle to Effectively Measure Performance Outcomes

2.4. Have your organization's/your recipients' outcomes improved over the past 12 months?

? / ↓

Performance Fell, or Don't Know

67%
57% in '22

46%
56% in '22

42%
41% in '22

✓

Performance Improved

33%
43% in '22

54%
44% in '22

58%
59% in '22

Federal   **State & Local**   **Non-Government**

■ Yes < 5%   ■ Yes > 5%   ■ Don't Know   ■ No

Lack of Staff and Tools are the Primary Reasons Agencies are Unable to Effectively Measure Outcomes

2.4b What contributed to the lack of improved outcomes or lack of ability to measure outcomes?
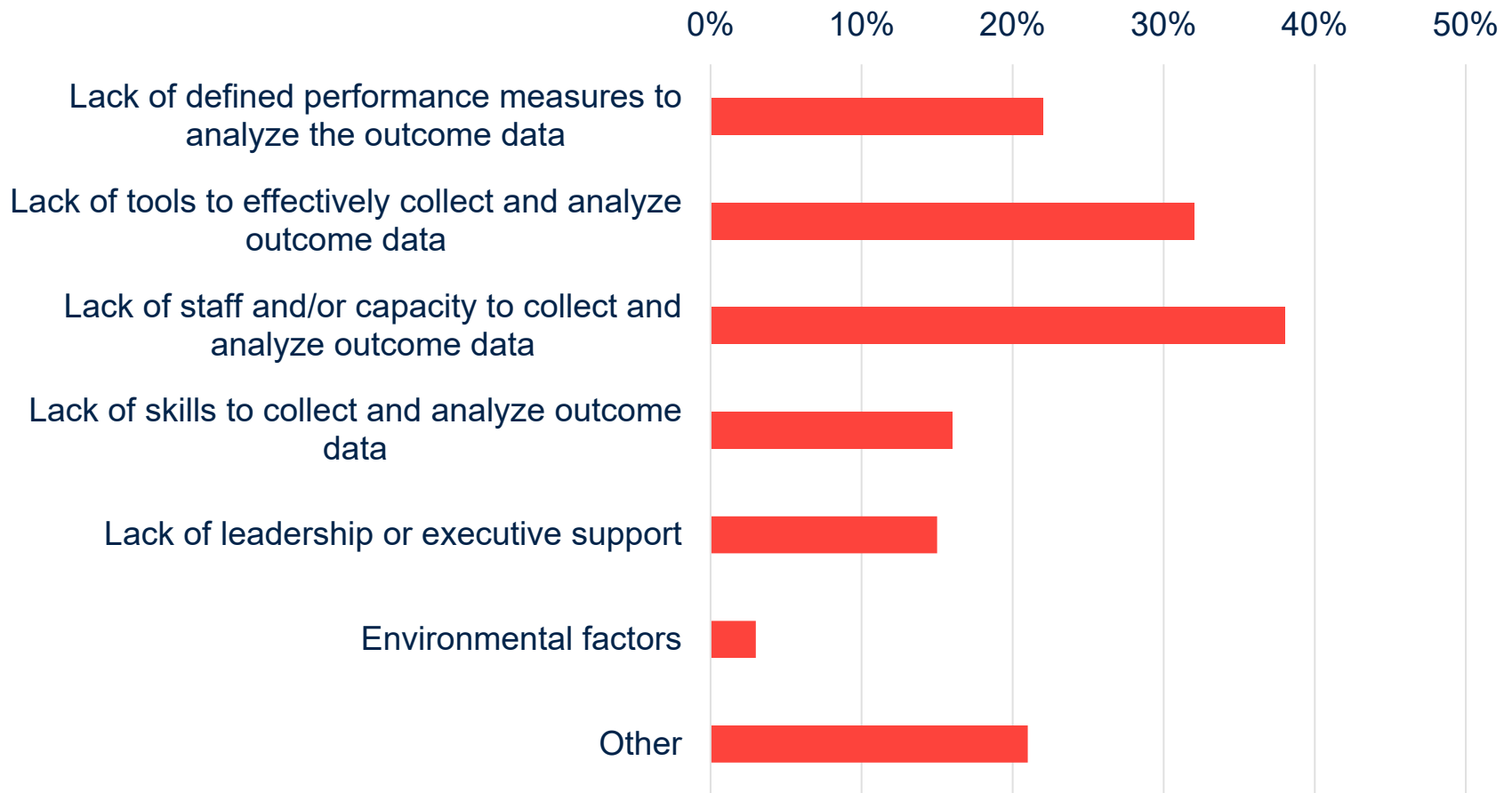
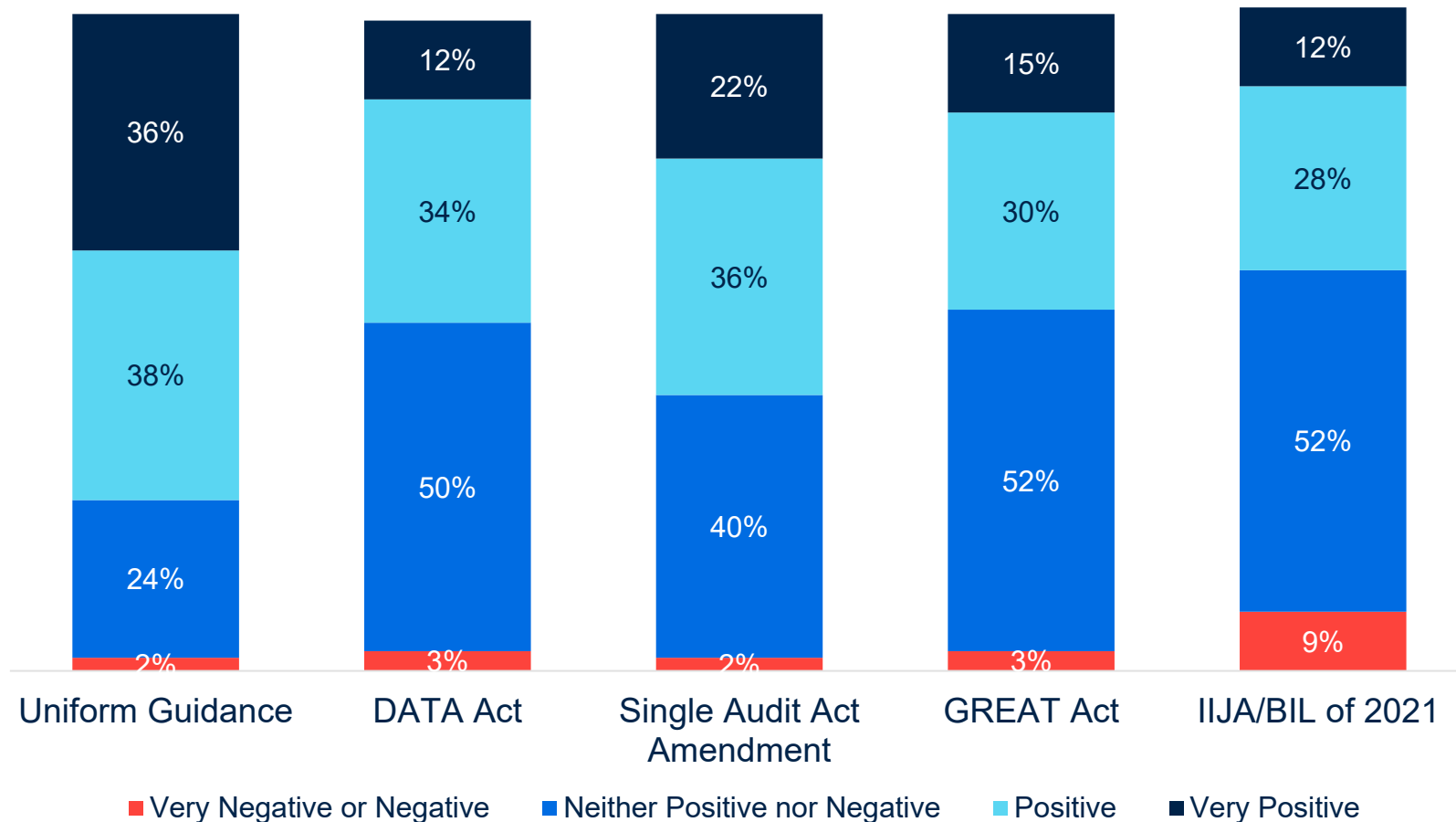# Grants Processes Enhanced to Align with E.O. 13985

Q2.5 Which grants lifecycle processes have been updated and enhanced to align with the Executive Order on Advancing Racial Equity and Support for Underserved Communities?

Pre-Award phase with over **50%** receiving the most focus
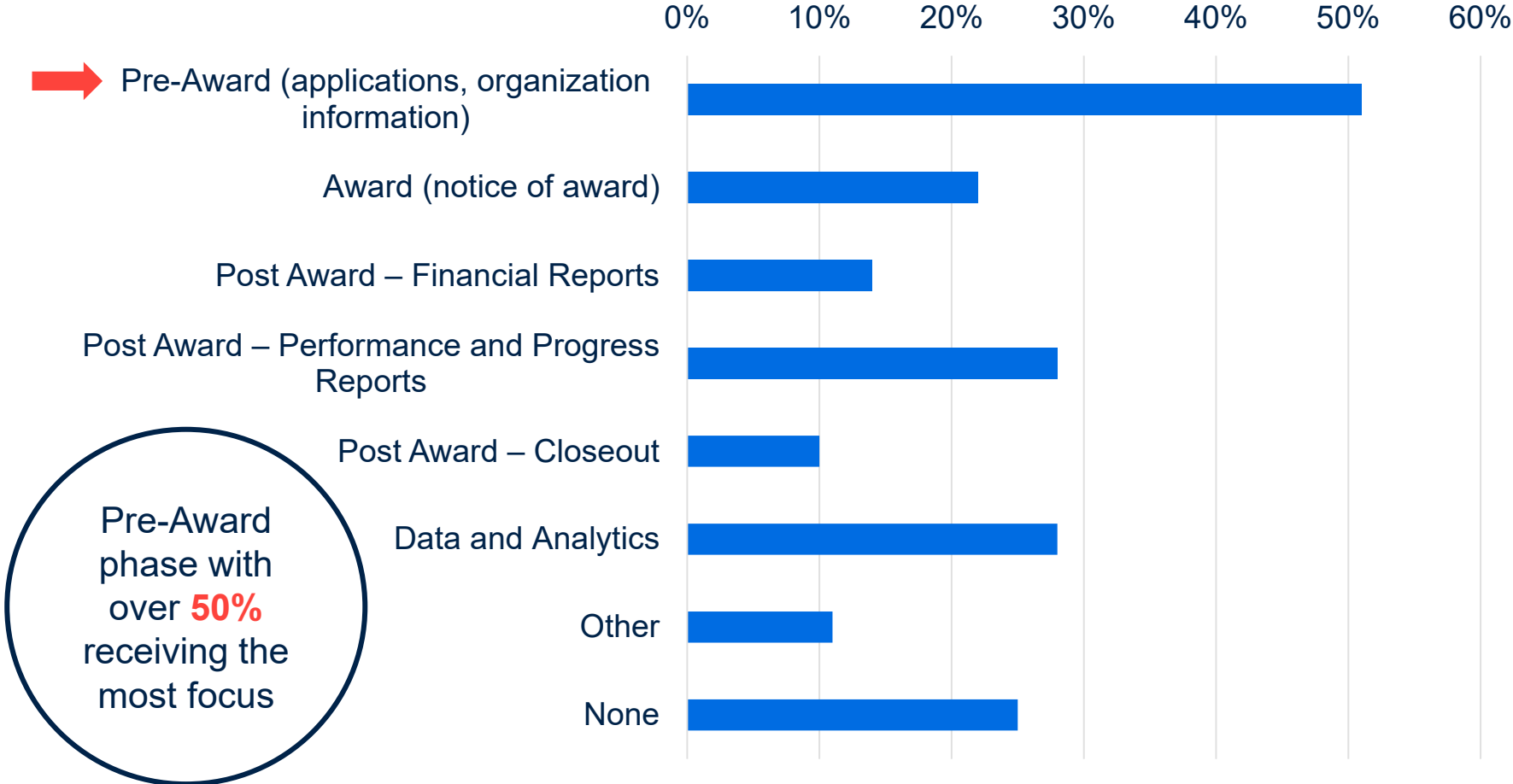
Moderate Impact of Federal Legislation and Executive Directives on Grants Management

Uniform Guidance Viewed Most Positive

5.1 Please rate the impact of each of the following federal legislative and/or executive branch directives on your **day-to-day grants management.**


	Uniform Guidance	DATA Act	Single Audit Act Amendment	GREAT Act	IIJA/BIL of 2021
Very Positive	36%	12%	22%	15%	12%
Positive	38%	34%	36%	30%	28%
Neither Positive nor Negative	24%	50%	40%	52%	52%
Very Negative or Negative	2%	3%	2%	3%	9%

■ Very Negative or Negative ■ Neither Positive nor Negative ■ Positive ■ Very Positive

Systems and Data

Grant Reporting Automation Needs More Attention

3.2 How would you describe the method used by your grantees to submit reporting?
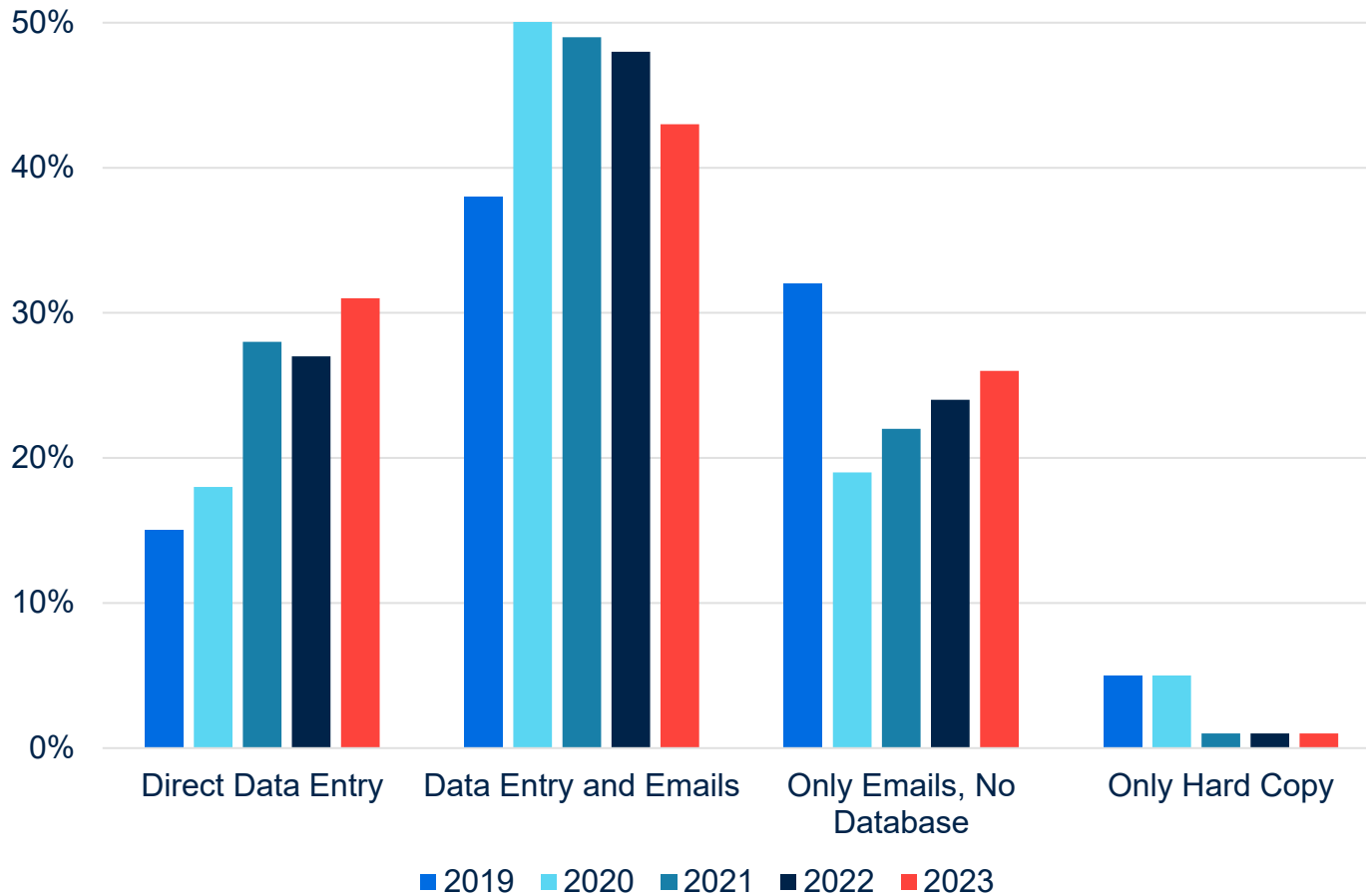
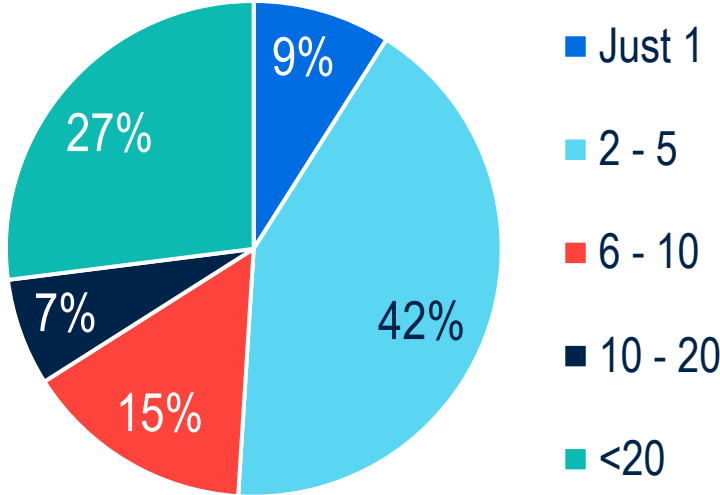# Majority of Organizations using between 2-7 Grant Systems by 10 or Less Staff

3.3 How many unique grant systems are you required to interact with?
3.4 How many staff members are required to interact with those grant systems?

Count of Unique Grant Systems
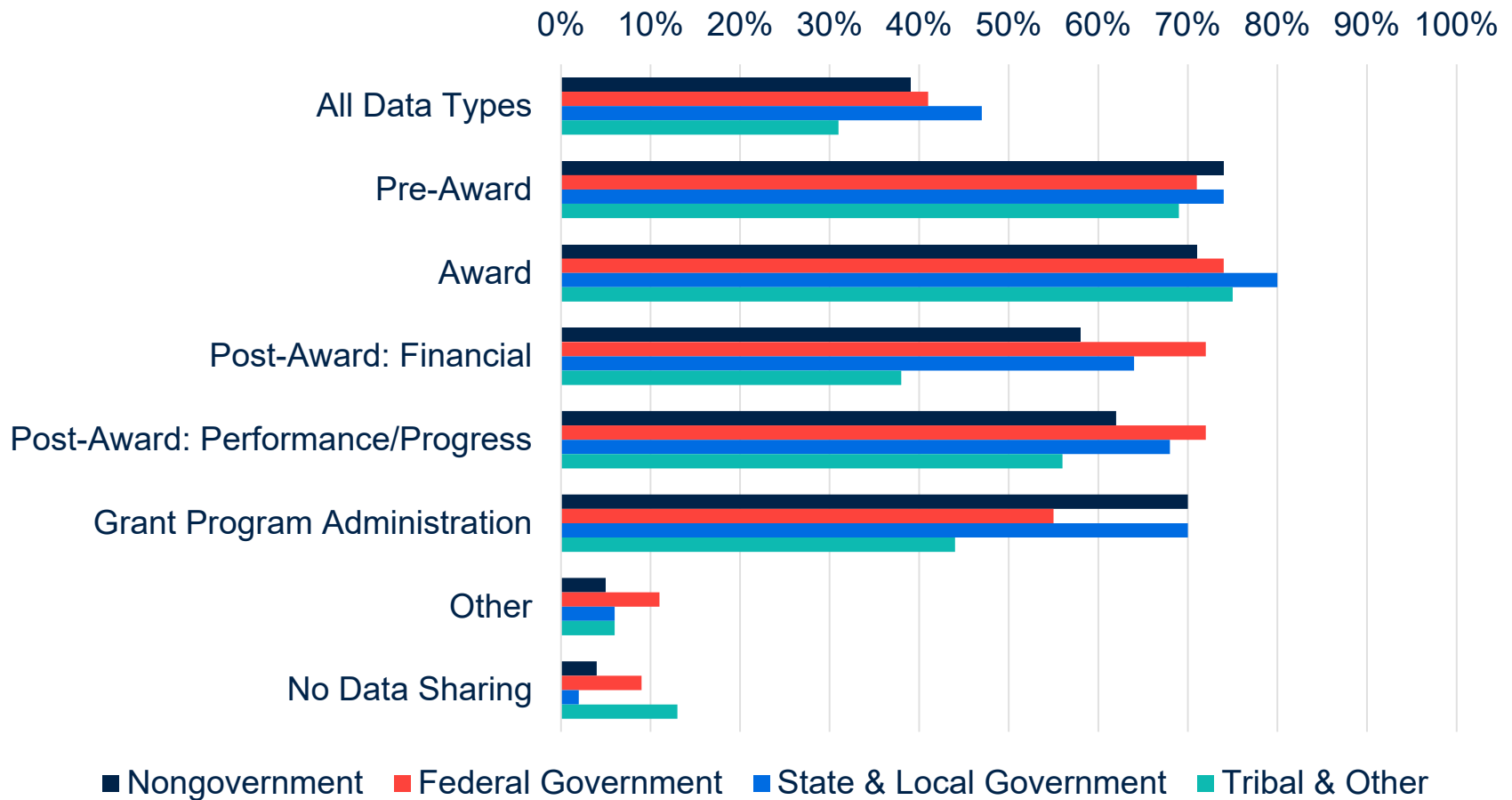
9% None
17% Just 1
32% 2 - 3
32% 4 - 7
10% <7

Legend:
- None
- Just 1
- 2 - 3
- 4 - 7
- <7
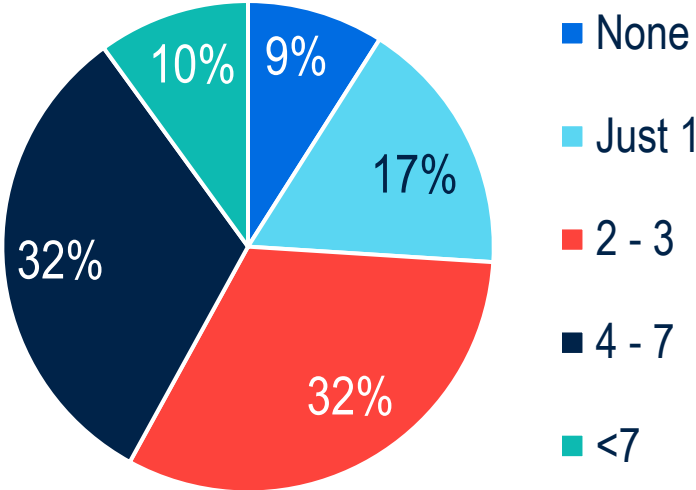
Count of Staff Members Using Grant Systems

9% Just 1
42% 2 - 5
15% 6 - 10
7% 10 - 20
27% <20

Legend:
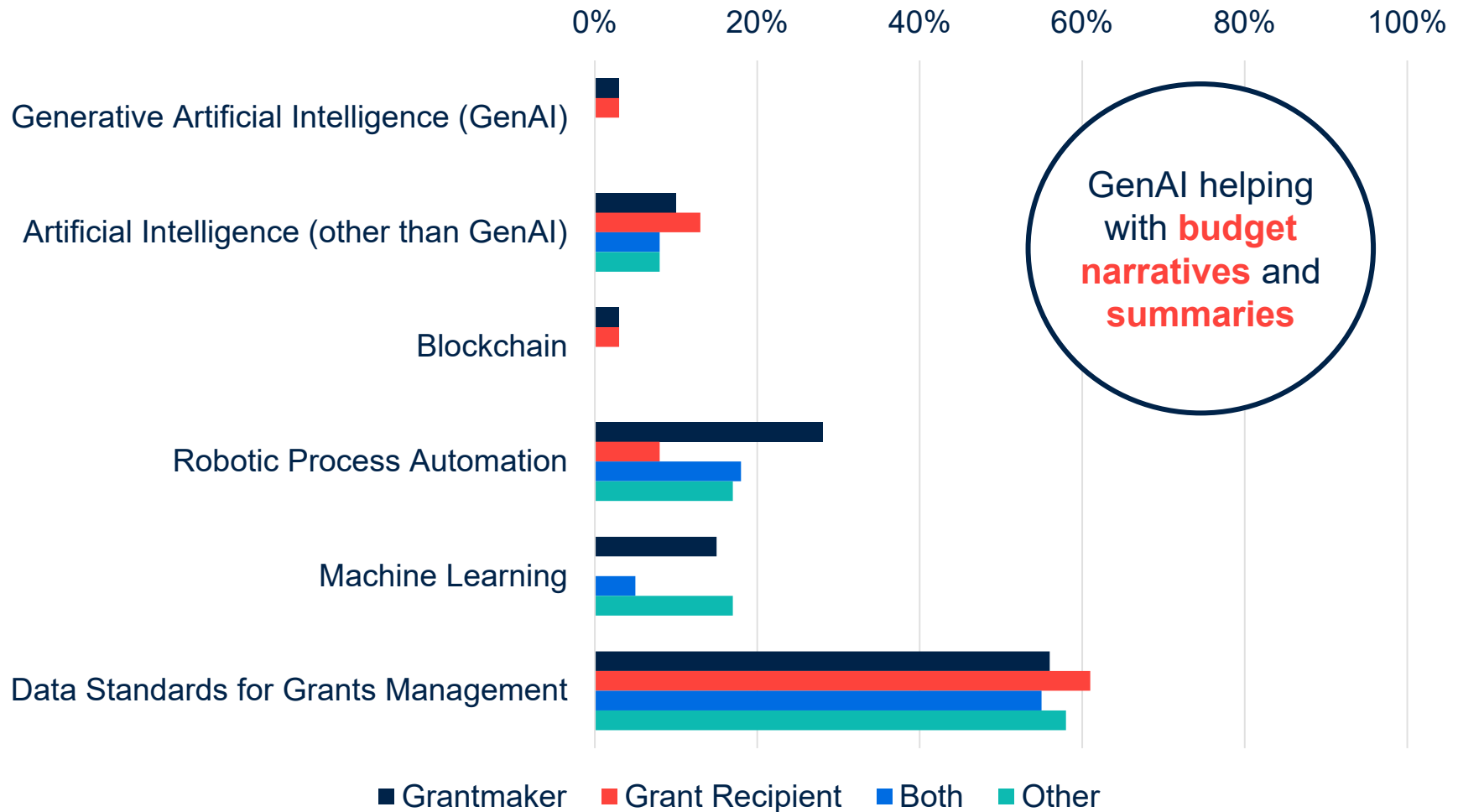- Just 1
- 2 - 5
- 6 - 10
- 10 - 20
- <20

There Is Strong Agreement on the Importance of Automated Data Sharing

3.5 What kind of data should local, state, and tribal governments and federal agencies share in an automated manner?

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Grantmakers Leveraging Data Standards but RPA, AI/ML, and Blockchain Slow to Gain Traction

3.6 Do you currently leverage any of the following in your Grants Management Systems?

GenAI helping with **budget narratives** and **summaries**

Categories (top to bottom):
- Generative Artificial Intelligence (GenAI)
- Artificial Intelligence (other than GenAI)
- Blockchain
- Robotic Process Automation
- Machine Learning
- Data Standards for Grants Management

Legend: ■ Grantmaker ■ Grant Recipient ■ Both ■ Other

Training

Despite Consistently Being Cited as a Top Priority, Training Decreased

While training certification requirements continue to slightly increase

4.2 Does your organization provide grant training to grant recipients or sub-recipients?

Legend: 2021, 2022, 2023

REI SYSTEMS
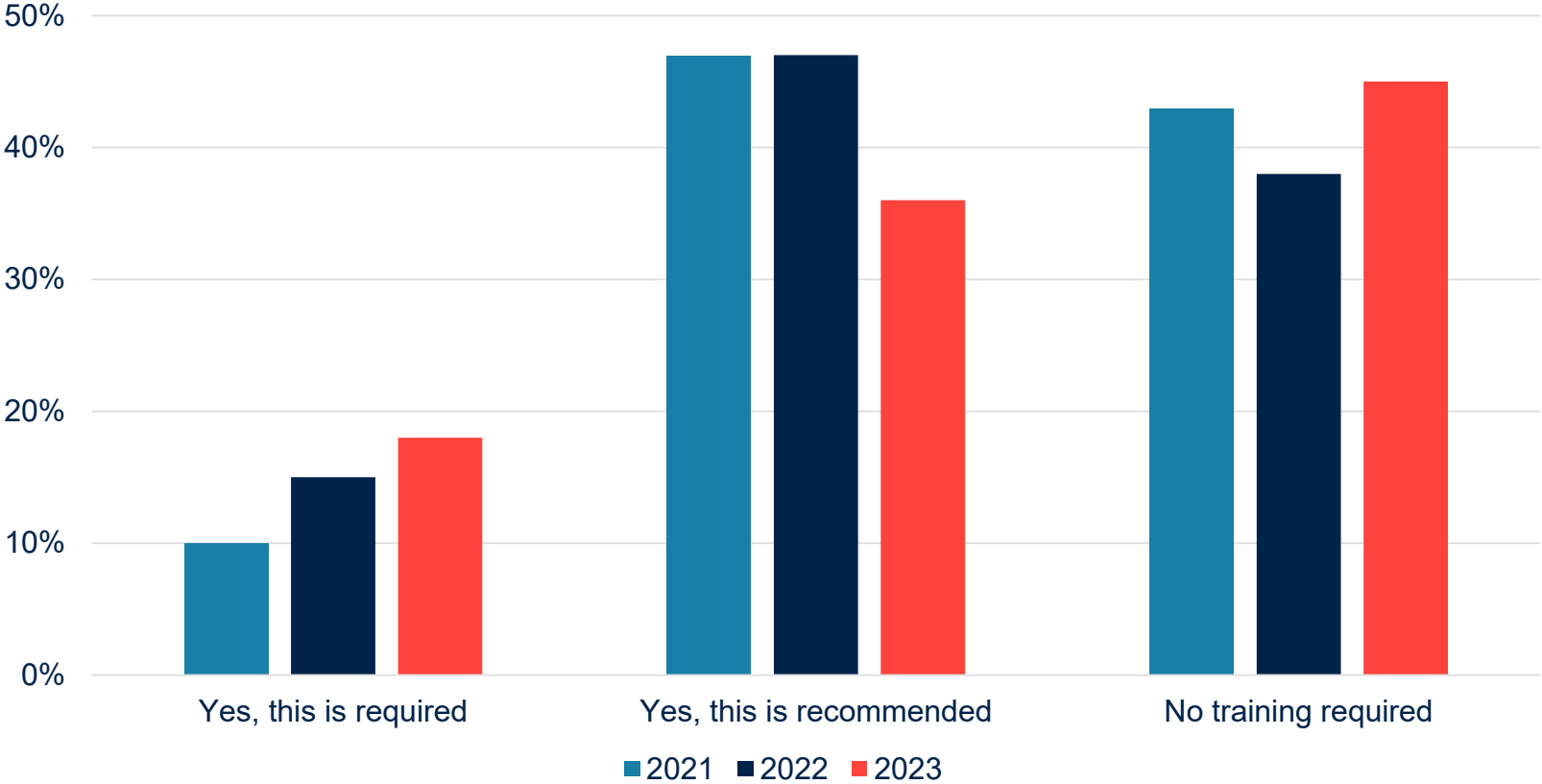
Less than 50% of Organizations Require Staff Receive Grants Management Training

Percentage Requiring Certification Has Increased

4.1 Does your organization require formal grant training of your staff?

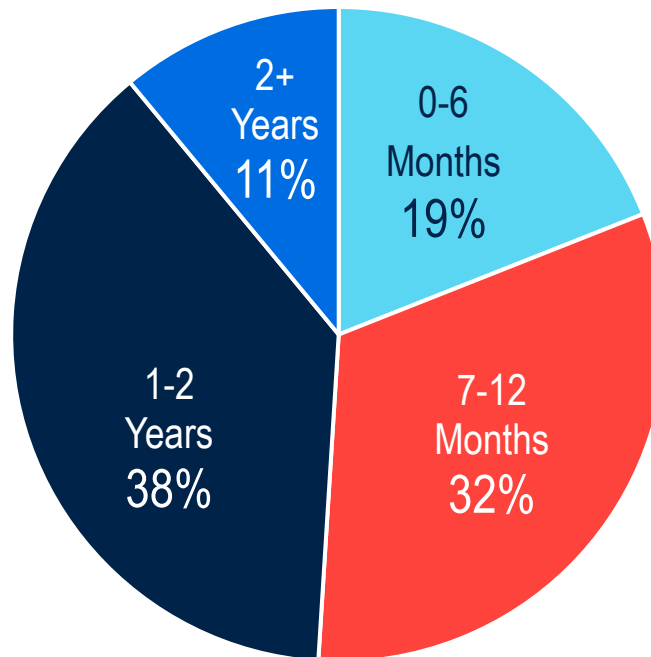Legend: 2019, 2020, 2021, 2022, 2023
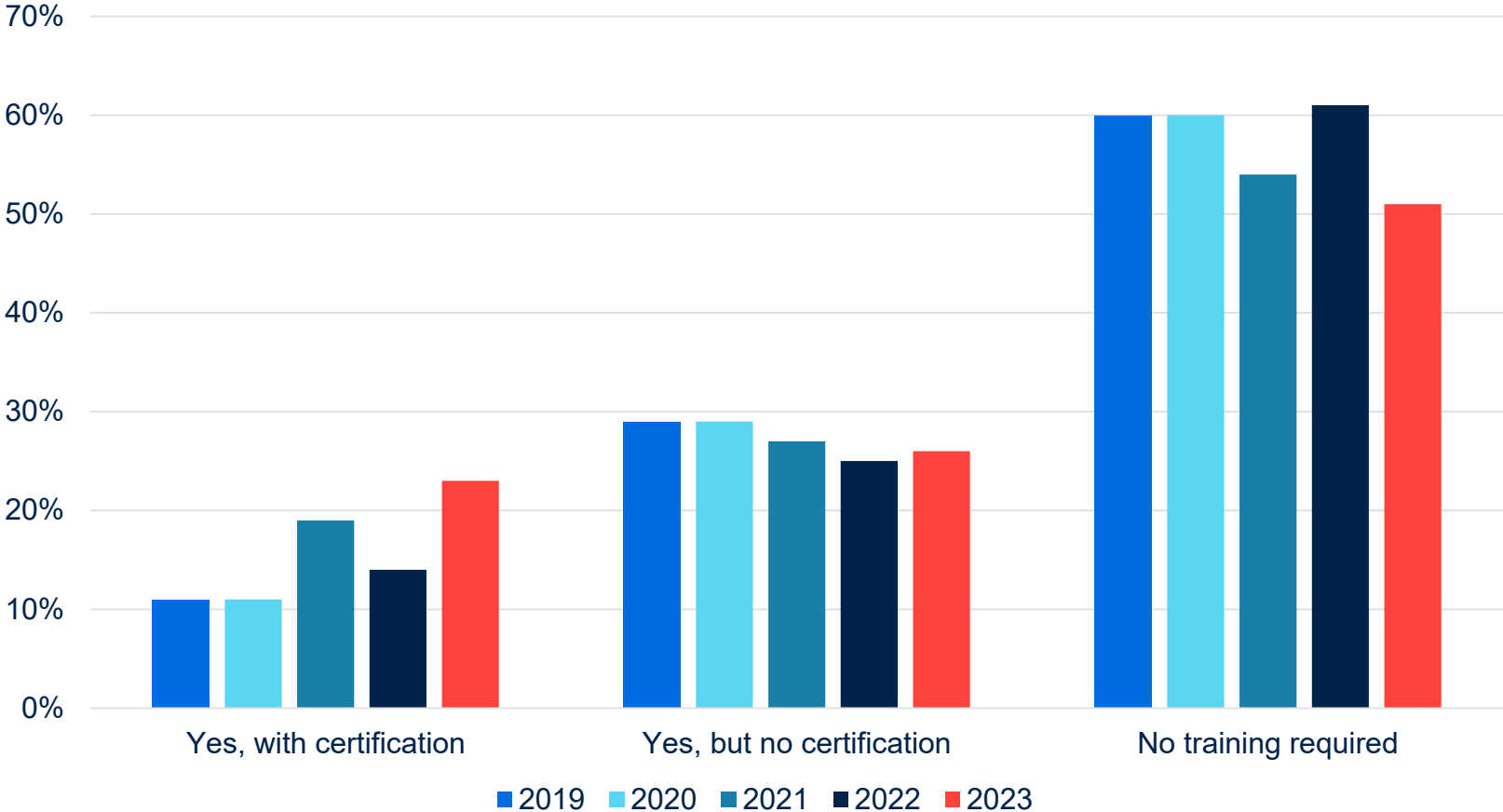
Training New Resources Takes Significant Time

38% Indicated It Takes Between 1-2 Years To Fully Train

4.7 In your estimation, how long does it typically take to fully train or ramp up a new resource to independently execute grants management actions?

Duration Required to Fully Train

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Top 5 Areas Where Additional Training Needed

Comprehensive Grants Management Training Highly Desired
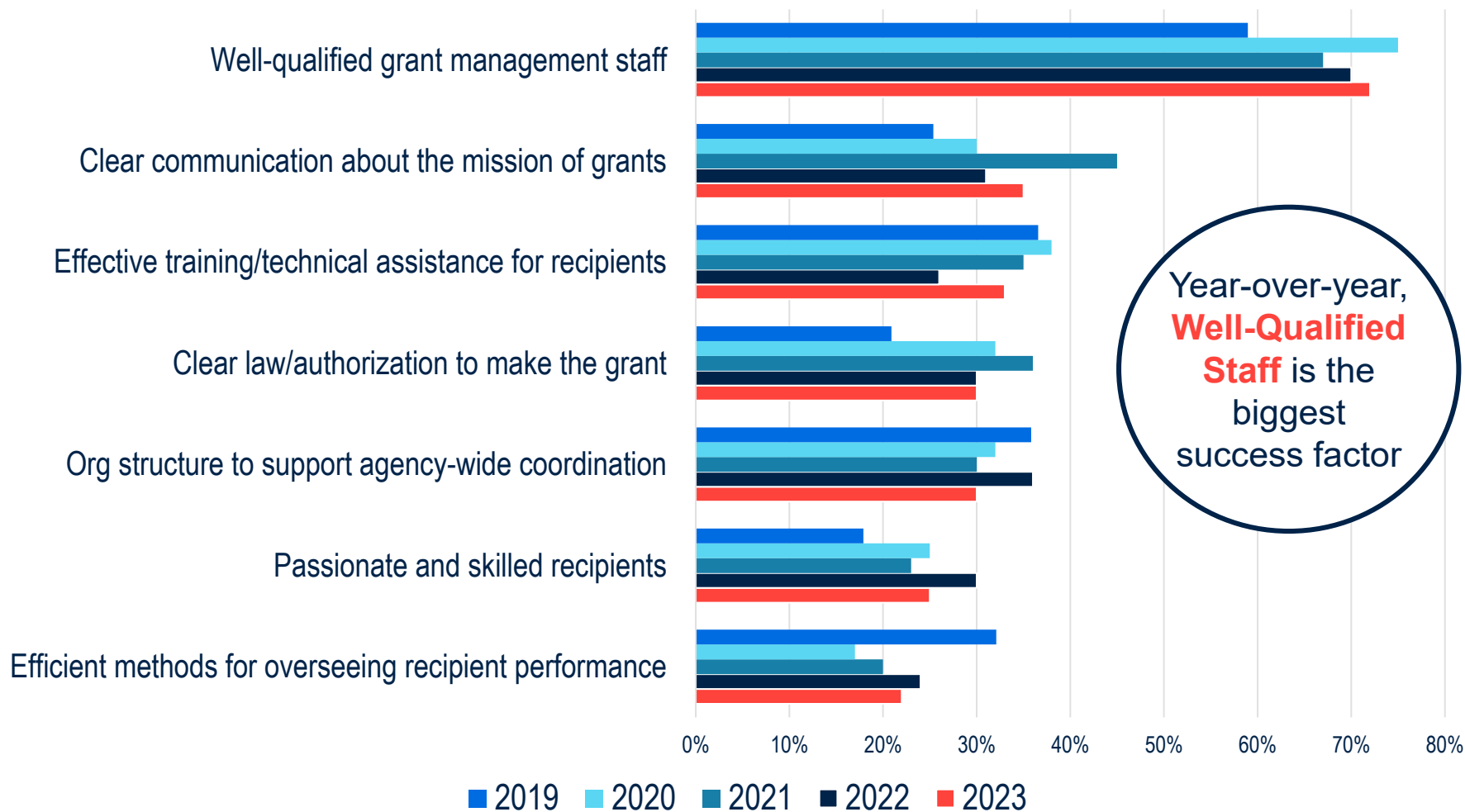
Q4.2 In which specific areas could your grants staff benefit from receiving additional training?

1. Full Lifecycle Grants Management

2. Regulations, Uniform Guidance, and Compliance

3. Financial Management - Budgeting, Reporting, Costs

4. Monitoring - Subrecipients, Post Award Submissions, Performance Metrics

5. Grant Writing

Success Factors and Challenges

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Successes

6.1. What are the **most significant factors in the success(es)** your organization has had in grants management in recent years?

Year-over-year, **Well-Qualified Staff** is the biggest success factor

Categories (top to bottom):
- Well-qualified grant management staff
- Clear communication about the mission of grants
- Effective training/technical assistance for recipients
- Clear law/authorization to make the grant
- Org structure to support agency-wide coordination
- Passionate and skilled recipients
- Efficient methods for overseeing recipient performance

Legend: 2019, 2020, 2021, 2022, 2023

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%

Challenges

6.2. What do you think are the **most significant challenges** facing grants management?
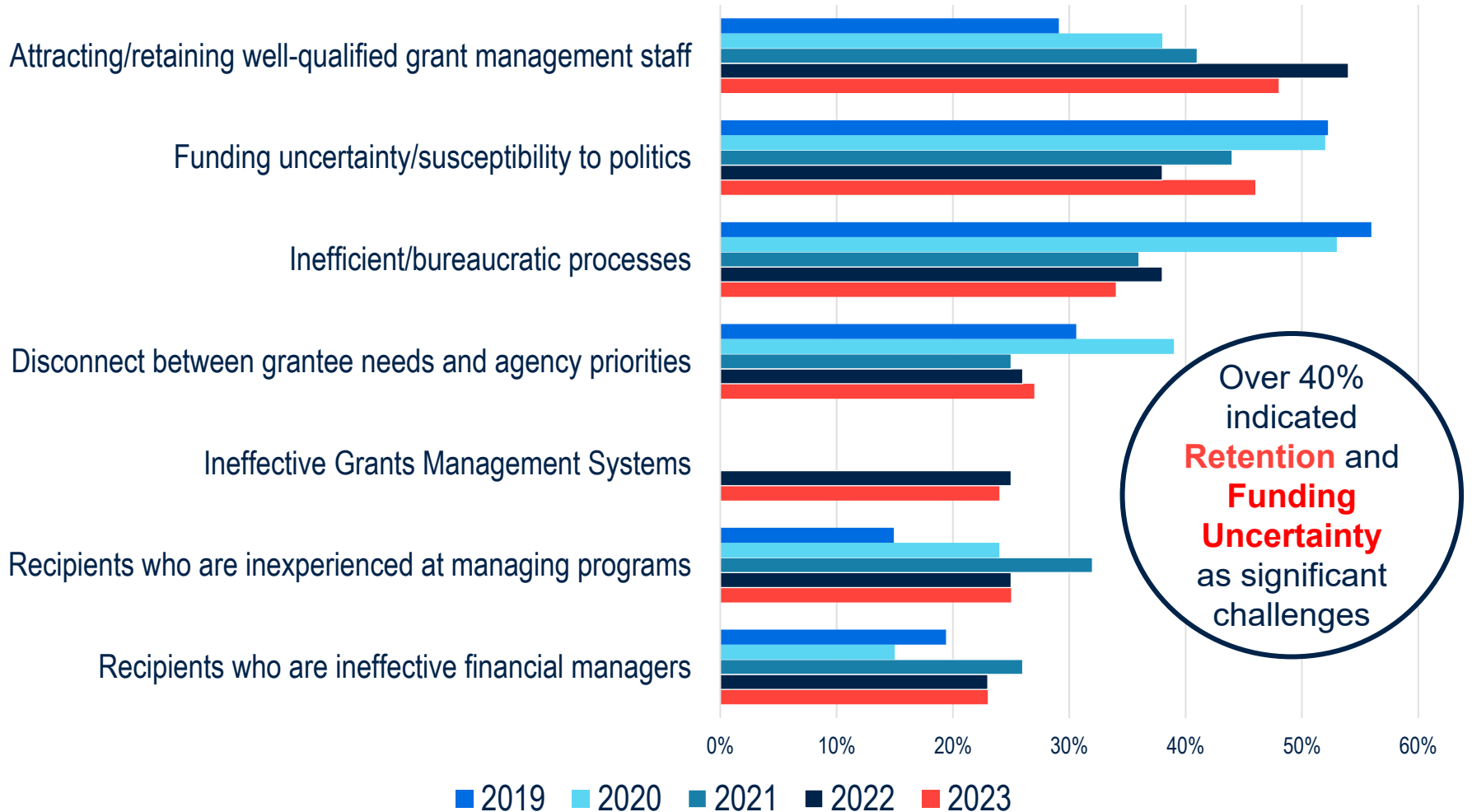
Suggestions from Survey Respondents – Priorities for Effort to Improve

6.4. What should be the **highest priorities/best ways** to improve grant management?

PEOPLE
→ More Training

→ Capacity Building and Retention

→ Support from Leadership

→ Stronger communications and collaboration

PROCESS
→ Clear legislation and regulations

→ Standardize and streamline

→ Better internal controls

→ Enhance transparency

TECHNOLOGY
→ Affordable and adaptable

→ Improved User Experience

→ Unified, full-lifecycle GMS

→ Automated data sharing

→ System integration

Top Priorities

6.5. What are your **top 5 priorities** over the next 3 years?

Priorities in alignment with current Challenges and Areas for Improvement

Key Takeaways

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Takeaways from Our Analysis

1   **DEIA: Organizations are working on advancing equity with pre-award phase getting the most focus**

2   **Retaining well-qualified staff and building capacity is paramount to successful grants management**

3   **Accessible, comprehensive grants management training highly desired**

4   **Challenges with Grants Management Systems fueling demand for better solutions**

5   **Clear and consistent legislation, regulations, and guidance for better compliance**

6   **Standardize, streamline, and automate processes and reporting to decrease burden on staff**

Navigating the Nexus:
Tech Challenges, DEIA Impacts, and the Future of Grants

Annual Grants Management
Survey Results

Thank you!

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NGMA
National Grants Management Association

Trachtenberg School
of Public Policy
& Public Administration
THE GEORGE WASHINGTON UNIVERSITY