Grants Data Management :

The Need for System Integration

By Tiffy Barnett

As the federal government moves forward with its e-grants initiatives, recipient organizations are slowly but surely learning the ropes of filing electronic applications. But that's not the only capability they need to develop. The fact is that most computerized grants management systems were devised before the widespread appearance of e-grants, and few are designed to handle e-grants as efficiently as they might.

As we enter this new era, it's logical to ask: What information should a good system maintain? What kinds of reporting functions should be accessible to system users? And what sorts of data must be shared with the organization's fiscal system? Software developers and software vendors aren't grants managers. They don't know what we grants managers really need unless we tell them.

Just how well are we doing at communicating those needs? If the results of my own unscientific survey are any indication, the answer is "not very." The survey in question grew out of efforts to improve grants management within the Metro Government of Nashville and Davidson County, where I am employed as a grants specialist. Two years ago, Metro created a new Division of Grants Coordination. My job responsibilities for the new division included compiling an accurate, up-to-date inventory of all the grants that Metro receives; capturing the most important information about these grants and conveying it in user-friendly formats; and ensuring that relevant data could be integrated into Metro's fiscal system.

After trying unsuccessfully to construct my own version of a suitable database using Access, and then making the rounds of software vendors' booths at grants conferences, I decided to see how other grants managers were approaching these tasks. In November, 2002, I e-mailed a questionnaire to 199 fellow grants managers around the country, most of them affiliated with professional groups like the National Grants Management Association. Over the next few months, I received 46 completed forms about half from grants managers in state or local government, about a quarter from grants managers working in nonprofits, and about a quarter from grants managers at colleges and universities.

I asked questions about the specific data maintained for each grant, the reporting capabilities of their system(s), access to the system(s), and methods for integrating systems if multiple systems were being used. I also asked respondents to list any data management functions they did not currently have but would like to have.

And, of course, there was the most important question: "What system(s) do you actually use?"

What I was hoping to discover was a system that we in Nashville could easily emulate. What I found was a mix of improvised approaches and most of the same problems that I was encountering in my own work. Two-thirds of the respondents indicated that they use two or more systems to manage their data, and almost a fifth used three or more systems. As for the software most often used, Excel was listed most frequently. Others included Access, Lotusnotes, Microsoft Great Plains, PeopleSoft, and various systems built on the organization's fiscal database. Among consumer off-the-shelf (COTS) products, Raiser's Edge and Blackbaud were listed by a few of the nonprofits.

The majority of respondents used more than one system. Of the 23 who included a description of how they linked multiple systems, all indicated that it was an awkward process, accomplished either by manually entering data from one system to the other, or by electronically importing data from one system into the other. Not surprisingly, then, when asked what they wanted most, better system integration topped the list.

Many respondents mentioned wanting better linkage with their fiscal system and better interface with intranet, Internet, or e-mail. Here are some other examples of what they were looking for in the way of system integration:

- "Cross referencing between Word, Excel, the grant guidelines, CFRs and other legal information."
- "Integration of pre- and post-award functions."
- "Linking sub-recipient information to the Revenue Grant Access database.
- "Fully integrated, computerized grant performance and fiscal management software package."
- "Off-the-shelf integrated software doesn't seem to exist in a suitable format."

In fact, integrated software suites, called enterprise resource planning (ERP) software, do exist, and several of these suites include a grants management

component. But of those respondents to my questionnaire who indicated that their organization did have ERP with such a module available, all noted that their own organizations have failed to purchase it.

What's going on here? I suspect that part of the problem has to do with the peculiar nature of grants and grants management. From a management standpoint, grants are a hybrid of WHAT (the program itself) and HOW (the fiscal/administrative elements that determine how the program is conducted and supported). A good grants data management system requires a good marriage of those program elements and fiscal/administrative elements. The systems we usually get, however, constitute not a marriage and not even cohabitation. Program data reside in one abode and fiscal data reside in another. Grants managers have to act as couriers, carrying data between these two abodes, or as mediators, attempting to reconcile the differences.

As long as ERPs have components capable of conjoining disparate grants management functions, and as long as vertical-based software vendors have the expertise to devise free-standing software capable of integrating program data and fiscal data, why do so many of us feel so frustrated? My guess is that we're not making our needs known at least not vigorously enough or clearly enough. Grants managers need to advocate more forcefully when their organizations are purchasing an ERP. And those of us who work in organizations without an ERP, or whose ERP lacks a grants module, need to advocate for free-standing software that can be integrated with our organizations' fiscal systems.

If that sounds like a tough challenge, consider the alternative. Either we make the case for better system integration, both to software developers and to senior management within our own organizations, or we go on cobbling together systems that force us to cart data back and forth between them, resulting in lost time and flawed recordkeeping.

Grants make up a significant proportion of the revenue that most local governments, institutions of higher education, and large nonprofits depend upon. Inadequate management of grant data can be very costly to recipients. That's why organizational decision-makers need to be persuaded that appropriately integrated grants management software, whether as part of an ERP, off-the-shelf, or custom built, is not a luxury but an essential investment.