



# GROWING A GRANT WRITING TEAM: A TALE OF LOUDOUN COUNTY, VA

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# Introduction

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- Director of Governmental Solutions
  - Grant management policies design/revamp
  - Grant management training, including compliance
  - Grants consulting services
- Previously employed with the City of Raleigh, NC, as the intergovernmental relations/grants manager; helped secure millions in grants and earmarks
- 11 years of local government experience



# What I Will Communicate

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- Discuss a holistic view of the Loudoun County effort to develop a successful grants team
- Review the following:
  - The challenge
  - The solution
  - The results
  - Loss of grants analyst position
  - A new direction
- Lessons learned
- General grants management tips



# Audience Benefits

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- Sharing a solution for a common challenge
- Learning from Loudoun's successful eCivis implementation
- Sharing best practices
- Grants management tips that can be implemented in your organization



# The Setting: Loudoun County, VA

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- Located in the Washington, DC, metro area
- Population in 1960 was 20,000 – current population is 328,533
- One of the fastest-growing counties in the nation
- One of the wealthiest counties in the nation
- 3,493 full-time employees/General Fund
- Home of Dulles International Airport



# The Challenge

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- Decentralized grant operations
- Every department doing its own thing
- No grants management policies and procedures in place
- Few departments were aware of grant search tools available
- Departmental budgets stretched thin due to the County's growth



# The Challenge (cont.)

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- Strain on resources
- Received few competitive/discretionary grants
- Received mostly formula or pass-through grants
- Grants showed up on the agenda with no one analyzing the potential impacts on the County:
  - What kinds of resources needed to monitor the grant?
  - Match requirements?
  - Grant/program sustainability



# The Solution: The Loudoun County Grant Initiative (LCGI) Begins

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- Hired a grants analyst located in the Budget Office
- Grants analyst fully dedicated to grants mgmt. and monitoring (part of positions' performance plan)
- Developed grants management policies and procedures
  - Presented to applicable departmental staff in grants meetings





# The LCGI Begins (cont.)

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- Reached out to eCivis, Inc.
  - Trained roughly 20 people on grant writing and compliance
  - Client Services worked with Loudoun staffers to support their use of GNR & KnowledgeBase
  - Helped implement Tracking and Reporting



# About eCivis

- eCivis is the premier online provider of federal, state, and foundation grant information and management tools
- Founded in 2000
- 40,000 hours of research every year
- Research, Tracking and Reporting, Writing, and Evaluating
- Built for Local Governments, Districts, and Nonprofits
  - City of Culpeper, VA, Town of Morrisville, NC, Fulton County, GA, Youngstown, OH
  - Flagstaff, AZ, Brighton, CO, Mecklenburg County, NC , City of Pasadena, CA
  - Worcester, MD, St. Lucie County, FL, Guilford County, NC, United Way of CA
  - Special Districts
    - Sacramento Metro Fire District, Orange MWD, Eastern Municipal Water District Perris, CA,
    - Northeast Ohio Regional Sewer, Memphis Light Water and Gas Division,
    - Port of Vancouver





# What eCivis brought to the table

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- Grants Network: Research
  - A grants database with federal, state, and foundation grants
  - Provided training for county users on conducting and saving grants searches
- Increased the number of grants viewed by County staffers
  - Previously had no active grant searches



# What eCivis brought to the table (cont.)

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- Tracking and Reporting
  - A data warehouse that stores all grant-related documents in a centralized electronic location
  - Grant documents more readily accessible to grants staff
  - Allows grant team members to stay on top of deadlines and compliance reports, lowering audit risk



# What eCivis brought to the table (cont.)

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- KnowledgeBase
  - An online grants university
  - Allows employees to take courses at their own pace
  - Allows the grants manager/supervisors to see staffer progress
- Dedicated eCivis support staff for software tools



# Implementation

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- The centralized grants analyst acted as a resource for departments:
  - Located potential grants and routed them to departments via Grants Network: Research
  - Assisted departments with grant writing
  - Position fully dedicated to grants management and monitoring
- Implemented standards for pre-award and post-award phases
- Departmental grant/program managers started to WIN competitive grants



# The Turnaround

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- Increased grant wins led to new challenges:
  - Monitoring requirements increased
  - Reporting challenges increased
- Solution for these challenges: Tracking and Reporting
  - Provided better visibility from top to bottom...no more silos!
  - Allowed access to each grant and all associated documents at every stage in the grants management lifecycle
  - Allowed centralized grants accountant to ensure grant compliance was being done accurately and on time



# The Results

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- ❑ Significant increase in the numbers of competitive grant wins!
- ❑ Significant time savings in grant application processing and in accessing grant documents
- ❑ A cadre of internal grants professionals
- ❑ Greater transparency (Budget Office reported in the county's budget document the performance measure for the grant opportunities applied for.)





# The Results (cont.)

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- Improved the audit process
  - Tracking and Reporting allowed County to provide a log-in to the auditor
  - Allowed the auditors to view documents in one central location



# A New Challenge

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- Centralized grants analyst left the County (duties of this position were added to those of a budget analyst)
  - Illustrates a need for succession planning – very real issue for local governments
- The budget officer who championed the LCGI left the organization
- No one updated T&R with signatories:
  - Did not update the process after grants analyst left



# A New Challenge (cont.)

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- Departments started to use new grant tracking methods:
  - Used intranet drives as a result of frustration with the system due to lack of signatory updates
- No one monitoring departments' use of the eCivis system for seeking grants and tracking grant documents
- No one assisting departments with researching and writing grants



# A New Challenge (cont.)

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- Departmental grants managers frustrated/not using eCivis
  - Everyone has another full-time job; grants management is only part of what they do every day!
  - Decreased focus on grant seeking
  - Grants managers used their own methods for organizing grant information



# A New Direction: The Turnaround Begins

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- eCivis Client Services Associate reached out to Loudoun:
  - CSA realized that grant activity had diminished:
    - No one was searching for grants or setting up new grant projects in GN:R and T&R
    - Many users hadn't logged into system in a long time
- Reinvigorating County Departments:
  - Two training sessions held
  - Budget analyst will now work hand in hand with departmental grant managers
  - Revising grant management policy/Budget Office's grants processes and procedures



# Success Factors

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- A supportive county administrator
- Supportive department heads
- A centralized grants analyst dedicated as a resource for staffers
- Budget Office reorganized the assignments of budget analyst, allowing one analyst to serve as the grants analyst
- Baseline and recurring grant writing training



# Success Factors (cont.)

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- Baseline and recurring grants management/compliance training
- Clearly defined grants management policies
- Access to thousands of new grants – Grants Network Research
- Access to a data warehouse for reports – Tracking and Reporting



## Success Factors (cont.)

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- Willing and excited staff members
- Many new staff did not know about eCivis and its many valuable uses; the training sessions provided this knowledge





# Analysis

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- Implement a grants team
  - Helps to keep grant team members focused on the goal of developing winning grant proposals
- Train more than one person in the grants analyst role:
  - If someone leaves, the process will not be impacted
- Importance of having a centralized data warehouse so everyone knows what's going on with grants
  - Someone must keep the system updated – when employees leave, changes must be made



# Analysis (cont.)

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- Succession planning, especially in the grants analyst role
- Regular updates for grants management policies – assign this responsibility



# Tips for Making Change

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- Analyze current grant writing/grants management processes
- Consider which staffers have grants experience and use it
- Consider centralizing the grants analysts role
- Bring in professionals rather than struggle for years and end up with audit findings



## Tips for Making Change (cont.)

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- Develop a grant review team to consider implications to the organization
- Make certain that the organization has good financial systems in place
- Consider consequences for inaction at the department level—do not allow departments to circumvent the established policies
- Make certain that the Finance and Budget Departments are active partners in this effort



# Tips for Making Change (cont.)

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- Conduct regular trainings, not just grant writing
  - poor grants management can cause significant issues with grantors
  - Offer update trainings to remind employees of solid grants management practices
  - Must also train new staff
- Contract or have someone develop training internally to be sure it includes compliance
- Develop a strategic grant management plan



# Questions?



# Contact Information

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