

UCEDD Tip Sheets

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ASSOCIATION OF UNIVERSITY CENTERS ON DISABILITIES
THE LEADERSHIP, EDUCATION, ADVOCACY & RESEARCH NETWORK



Admin Essentials Setting Targets and Evaluating Performance of Grant Professionals

What is Addressed in this Tip Sheet?

This tip sheet discusses the roles and responsibilities of grant professionals, along with strategies to set targets and evaluate their performance. It shares industry resources on grant professional competencies and suggested quality performance measures. It summarizes a virtual roundtable conversation on the topic held on January 20th, 2021 and [archived here](#).

The Admin Essentials series brings together UCEDD directors and business managers with content experts to address pressing administrative challenges. These virtual roundtables provide an opportunity to share resources, troubleshoot challenges, and brainstorm creative solutions to a broad range of administrative topics.

Why is this Important?

UCEDDs are required to leverage funds as part of their operations. [The Developmental Disabilities Act](#), Sec 154 (a)(3)(F) explains that centers will “to the extent possible, utilize the infrastructure and resources obtained through funds made available under the grant to leverage additional public and private funds to successfully

achieve the projected goals developed in the 5-year plan.”

While not all UCEDDs have dedicated grant professionals on staff, seeking, securing, and managing grants is a primary way that UCEDDs fulfill their responsibility to leverage additional funds. Thus, UCEDDs can benefit from understanding the roles and competencies of grant professionals and how to evaluate their performance. This understanding will help inform how the UCEDD network can strengthen its grant infrastructure and the sustainability of its work.

This topic was suggested following the [2020 TA Institute breakout on “5 year planning to leverage funds”](#), where the breakout group requested additional information about grant professionals.

What are the Promising Strategies

Developing a grants department or grant strategy

Having a diverse revenue stream can help a UCEDD to sustain operations and try new things (i.e., pilot projects). Having a grants department can help coordinate strategically for the broader center, with grant professionals helping identify potential revenue streams. If you’re thinking about developing a grants department or grant strategy, you may ask what do you want grants to do within your center or within departments? What role do you play in the larger community?

Grant professionals are more than just grant writers. They can also assist a UCEDD by conducting grant research, developing relationships, and coordinating with principal investigators (PIs) and program teams to get things done on time. Furthermore, grant professionals can assist their organization with planning how grants live in the UCEDD’s overall development strategy and build relationships with potential funders.

Grant professionals can’t exist in a vacuum however—many times they are responding to the narrative field of a grant application which requires insight of programmatic staff, especially PIs, to say what is happening in the field, what isn’t being done, and who the UCEDD can partner with to do more.

Grant professionals can assist their organization with planning how grants live in the UCEDD’s overall development strategy and build relationships with potential funders.

Return on Investment (ROI)

As you’re crafting your grant strategy or grants department, you might wonder, what’s a normal success rate? What’s a normal return on investment?

It depends. The yield and ROI is typically much higher for government grants, especially federal grants. However, the competition can be much higher because it’s national and not just your local area. The last major study on ROI was in 1996. The ROI was 5:1 (500%) for foundations and corporations (Greenfield, J.M. Fund-Raising Cost Effectiveness: A Self-Assessment Workbook). There isn’t an examination of federal grants, but anecdotally it is around 10:1.

According to the [State of Grant Seeking reports](#), the average federal grant costs \$10,000-\$50,000 to write and the average federal award has a median amount of \$425,000.

Training or Hiring Qualified Grant Staff

Hiring skilled and competent grant professionals can support your UCEDD’s development and strengthen relationships with funders. UCEDDs might consider developing position descriptions using a competency-based framework and hiring certified grant professionals who have demonstrated the desired competencies.

UCEDDs might consider developing position descriptions using a competency-based framework

There are two main credentialing bodies in the U.S. for grant professionals:

| Credential Body | Credential | Who is it good for? | Accredited? |
|--|--|--|----------------|
| The Grant Professional Certification Institute | GPC: Grant Professional Certificate | Working on the full grant lifecycle | Accredited |
| The National Grant Management Association | CGMS: Certified Grants Management Specialist | Grant management only- especially with federal dollars | Not Accredited |

Certified grant professionals have:

1. Knowledge of how to research, identify, and match funding resources to meet specific needs
2. Knowledge of organizational development as it pertains to grant seeking
3. Knowledge of strategies for effective program and project design and development
4. Knowledge of how to craft, construct, and submit an effective grant application
5. Knowledge of post-award grant management practices sufficient to inform effective grant design and development
6. Knowledge of nationally recognized standards of ethical practice by grant professionals
7. Knowledge of practices and services that raise the level of professionalism of grant professionals
8. Knowledge of methods and strategies to cultivate and maintain relationships between fund-seeking and recipient organizations and funders
9. Ability to write a convincing case for funding

(Grant Professionals Certification Institute, 2007)

These competencies can also be used to support the professional development of your already existing staff. While UCEDDs may not have a dedicated grant professional, developing your existing staff using the listed knowledge and skills, can strengthen your UCEDDs capacity to secure grants.

Managing Performance

It can be challenging to know if grant professionals are doing their jobs well since so many factors impact the success of grants. A helpful performance management resource is Foundant Technologies' [8 Grant Reports- Metrics and KPIs](#). It provides guidance on what metrics your UCEDD might consider tracking, without becoming overburdensome.

The report outlines key ideas including:

- Using a dashboard view to quickly monitor your key performance indicators
- Displaying grants by stage to gain a progress update of grant fundraising over time
- Tracking grant win percentage
- Creating monthly grant reports
- Summarizing what has been done and what is left to do in a task report
- Identifying top funders
- Keeping track of upcoming obligations
- Developing funder summary reports to document a history with a specific funder

(Tilzey, n.d.)

These key performance indicators, metrics, and reports can demonstrate return on investment (ROI) and help make strategic grant decisions.

For example, if you track your data by month, you may see that one month you're submitting applications for 17 grants, but only getting half of them. In all other months, you might submit fewer grants with a higher success rate. In this scenario, the UCEDD might consider not applying for so many grants at once because the quantity may be adversely affecting the quality.

Task reports, described in the [8 Grant Reports- Metrics and KPIs](#), summarize what has been done and what is left to do for a given grant. It includes tasks such as creating a grant budget or submitting a follow up report. Task reports can be useful for supervisors to see if people are meeting team deadlines and if all team members contributing to a given application or to a grant report have fulfilled their responsibilities.

Another resource for designing performance metrics for grant professionals is the 2019 strategy paper, [Designing Performance Metrics for Grant Professionals: Recommendations from the Field](#). It outlines all of the different types of tasks that grant professionals are engaged with and suggested metrics to evaluate performance.

The success or failure of an individual application is influenced by more than just the quality of the grant writer. When evaluating the performance of grant writers, other variables that impact success to consider include:

- Quality of the project
- Organizational grant readiness
- Previous track record
- Other areas of support
- Recent funding trends for the program and service area
- Competitiveness for an award
- Funders' level of interest in the mission and activities
- Influence with the program office or board members

It is also an industry standard to require up to three years to demonstrate effectiveness and efficiency.

This helps a development professional get credit for building a program (which takes time), for finance to account for grants that get awarded in the next fiscal cycle from when written, and to account for requests that cannot be repeated.

In measuring their performance, UCEDD Directors may consider looking at:

- Grants awarded vs. grants applied
- Cost to write a grant vs. award amount
- Internal cost (not just PIs time, but finance and admin costs and supplies)
- Turnover rates of grant professionals
- Success rates of grant professionals by years in the field

Recommendations

- Consider hiring a credentialed grant professional or support whomever in your center is writing and managing grants to participate in professional development opportunities for grant professionals.
- Have a network of peers or colleagues to look over a grant before submitting. Consider a multi-step review process, to check for compliance and ensure you are answering the questions the funders were asking (in their language).
- If you see less than 10 awards being offered, consider having a conversation with the program officer to make sure they don't already know where those funds are going. On more competitive grants, you need to be realistic about how big of a player your center is.
- Start tracking different metrics to strengthen your overall grant strategy and to aid in evaluating grant professionals by using the key performance indicators and recommended performance metrics.

What are the Relevant Resources?

- [Setting Targets and Evaluating Performance of Grant Professionals archive](#)
- [Competencies and Skills for a Grant Professional- Grant Professional Certification Institute](#)
- [8 Grant Report Metrics and KPIs](#)
- [Designing Performance Metrics for Grant Professionals: Recommendations from the Field- Grant Professionals Association](#)
- [2020 Salary Benefit Survey \(paid resource\)](#)
- [2019 State of Grant Seeking Report](#)
- [2017 State of Grant Seeking Report](#)

For More Information

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