



Grants and Fiscal Officers Peer Session

November 14, 2014

Notes

I. Introduction

The session started off with introductions of approximately 30 grants officers attending the session. Session attendees discussed their current grants management systems and noted aspects that were working for them and some things that were not. Attendees reported using a variety of systems, with a few still using paper systems.

II. Technology Evolution and Process Evolution

Attendees broke into small groups for roundtable conversations about how changing technologies have affected the work of grants officers.

Group 1

What would your constituents say is your biggest technology improvement?

- going paperless
- system is working
- on-line training/interactive webinars
- scoring process
- providing information in advance/fewer phone calls

Important items (not technology related)

- customer service
- in-person panels are still valuable
- data quality
- there is no silver bullet (technology does not do the work for us)

Peer advice

- How do we get our systems to talk to each other?

Group 2

Technology that makes processes more efficient:

- good for applicants and panelists
- panelists get to preview applications and supporting materials
- reducing paper is good
- good for mail-merging contracts and award letters
- efficient for searching past applications
- cleaner application process
- saves storage space and trees

Technology that makes processes inefficient:

- tech can be inefficient for grants officers
- troublesome maintenance and upkeep
- expensive
- requires lots of staff time and training
- incompatibility with applicants' and panelists' operating systems and browsers
- inconsistent and incorrect data entry by applicants
- data corruption through improper use
- incompatibility and incoordination between the grants management system and state financial systems and Cultural Data Project
- tech leads to either less contact with constituents or too much contact with constituents

Group 3

How is it possible to do it over when there's no time to do it right in the first place?!? When we all wear many hats AND there's not any ONE-SIZE FITS ALL GOLDEN system?

Technology has given us more opportunities, but with that comes...

- more troubleshooting
- an expectation of IT expertise
- increased expectation of immediate response (manufactured sense of urgency)

Technology helps constituents, but our challenge is to keep all the balls in the air!

III. National Endowment for the Arts Grants Office

Representatives from the NEA Grants Office shared recent changes to Office of Management and Budget requirements.

- Nicki Jacobs, Grants & Contracts Officer (Director)
- Carrie Holbo, Grants Management Specialist

Grants Officers Peer Group coordinators:

[Kristin Han Burgoyne](#), Montana Arts Council

[Dia Foley](#), Ohio Arts Council

[Ryan Stubbs](#), NASAA Research Director / Staff liaison

[Kelly Liu](#), NASAA National Standard Associate / Staff liaison

"The thing about the basics is they don't really change—it's the details and the proportions that change." —*Unknown*

"I pick up the details that drive the organization insane. But sweating the details is more important than anything else." —[Indra Nooyi](#)