

Section 4.3: Grant Opportunity Vetting, Routing and Assignment

PURPOSE AND POLICY

Pursuing and managing grants requires considerable staff resources. As such, potential grant opportunities should be reviewed and vetted to ensure that the resources spent to secure funding demonstrate a return on investment. Grant opportunities are posted via a notice of funding availability (NOFA), which offers detailed guidelines regarding the grant requirements. This is the pre-application period, so grant program managers should take advantage of any type of assistance offered by the grantor during this time, such as a pre-application conference call or webinar. Non-governmental grant opportunities typically follow a similar process as well. The Office of Grants and Federal Resources (GFR) encourages state agencies to use eCivis for researching and pursuing grants; the State of Arizona Accounting Manual ([SAAM](#)) [policy 70.05](#) states that grants shall be established in eCivis. The grant program manager can assign vetting tasks to colleagues on a grant pursuance team within eCivis.

PROCEDURE

Reviewing and Vetting. Now that the grant program manager has identified a list of grant funding opportunities, the list must be vetted to ensure that the agency expends resources pursuing only those grants that they are likely to receive. The list should be organized by pending due date. The grant program manager should do an initial review prior to routing the grant opportunities to other interested parties within his/her agency. The initial review would include determining whether the grant meets the agency's mission, needs and priorities; if the pending deadline allows enough time for application preparation and submission; and whether the funding amount is worth pursuing (many agencies have a "bottom line" minimum for pursuing grant).

The agency staff responsible for managing a grant should be included in the reviewing and vetting process for grant opportunities. The checklist or [matrix](#) should include, at a minimum:

- Whether the agency or division has the capacity to manage the grant
- If administrative costs are included and sufficient to justify pursuing the grant
- If a match is required and whether the agency or division can meet the match requirement
- If additional requirements are included, such as a NEPA review or some type of certification
- If a partnership or other collaborative agreement is required, are those resources already in place
- Whether the project or program to be funded is sustainable after the grant funding ends.

Internal Grant Opportunity Routing and Assignment. For smaller agencies, the routing of grant opportunities for review may consist of sharing the grant opportunity list with an agency financial representative and the agency head. For larger agencies, the grant program manager will route and share the grant funding opportunities among multiple staff, including among division leaders for funding specific to their division mission (i.e., a public health education and outreach grant specific to the epidemiology division in a state Department of Health Services). In either case, the grant program manager should route the opportunity with a deadline for return and a checklist or matrix to determine

if the grant has a viable chance of being funded. Again, this can be conducted within eCivis as long as those involved have an eCivis account. The grant program manager, as the project lead, can add others to the grant pursuance team. The grant program manager could assign tasks (such as Grant Review) with a due date. Team members would receive email notification. As tasks are completed, the status is updated in eCivis and visible on the project dashboard for each member of the team. This process would continue through the lifecycle of the grant.