



Midpeninsula Regional
Open Space District

R-18-86
Meeting 18-30
July 25, 2018

STUDY SESSION AGENDA ITEM 1

AGENDA ITEM

Grants Program Strategic Plan Update

GENERAL MANAGER'S RECOMMENDATIONS

Review the preliminary findings from the grants program audit, including feedback received from internal and external interviews, and provide input to guide the development of the Grants Program Strategic Plan and its related recommendations. No Board action required.

SUMMARY

The Grants Program is currently undergoing a strategic planning process, the outcome of which will be a comprehensive three to five year vision and action plan for the Grants Program. The goals for the plan are to increase grant funding and the ability to leverage existing funds, fully embed the Grants Program into the organizational culture, integrate grant work into program and project schedules, ensure staff are well trained and able to respond to grant cycles, and expand the District's partnerships and collaborations to proactively create new funding opportunities.

District consultants have completed a Grants Program Audit and a series of internal and external interviews to better understand how the District can improve and grow the Grants Program. The research findings and Board input will inform the development of the Grants Program Strategic Plan.

DISCUSSION

The Grants Program is currently undergoing a strategic planning process, the outcome of which will be a comprehensive three to five year vision for the Grants Program. The goals are to build a well-defined vision and action plan for the Program that:

- Increases public and private grant funding;
- Increases the ability for the District to leverage funds;
- Embeds the value and importance of the Grants Program in supporting the District's long-term financial success across all levels of the organization;
- Strengthens each staff member's skills and individual role in the Grants Program while ensuring adequate time to secure grants is built into future project plans; and
- Expands the District's funding partnerships and collaborations while honoring existing partner relationships with outside funders.

Strategic Planning Process

To assist with strategy development, the District retained the services of Tina Stott, of Stott Planning Associates and Donna Fletcher of Mission Driven. The strategic planning process began in April 2018 with the formation of a Project Team to oversee progress and provide input. The Project Team includes Grants Specialist Melanie Askay, Acting Assistant General Managers Christine Butterfield and Brian Malone, and Chief Financial Officer Stefan Jaskulak. Early research work included a review of background information, interviews with the District General Manager, Assistant General Managers, and departmental teams, and external interviews with the Grants Program staff from other agencies and nonprofit organizations. The findings from this research and the interviews, as well as an input received from the Board at the July 25 Study Session, will inform the development of the Grants Program Strategic Plan, which will include recommended policies, a program structure, procedures, and implementation tasks.

Audit Summary and Preliminary Findings

Below is a summary of the process and preliminary findings of the Grants Program audit, which the Board will review in more detail on July 25.

Grants Program Audit

Audit process:

The project consultants, Tina Stott and Donna Fletcher, prepared the Grants Program audit from a review of all existing grants-related systems, procedures, and workflows, as well as from the departmental interviews. The review included historical grants information in addition to processes that the Grants Specialist instituted after arriving at the District.

Audit findings:

- Historically, grants make up between 0 and 5% of the District's revenue.
- The Fiscal Year 2018-19 Budget includes a projected grant income of \$1,042,040 for Measure AA projects (2% of the 2018-19 total revenue).
- Grants secured from 1989 to 2010 for acquisition and development, resource management, and restoration equaled \$50,030,242.
- Between 2012 and 2018, grant revenue fluctuated significantly from \$0 to \$1,949,500, averaging \$1,200,000 annually.
- Since the passage of Measure AA in June 2014, and prior to the formation of a dedicated Grants Program in January 2017, grant revenue dropped, averaging approximately \$500,000 per year with records showing no grants received in 2014-15 and 2016-17.
- In FY2017-18, since the establishment of the Grants Program, the total dollar amount of grants received has exceeded grants received in any of the prior five years. In 2017, grant income totaled \$1,050,000. So far in 2018, the District has secured \$899,500 in grant income.

Prior to 2016 and the hiring of a new Grants Specialist, departmental program staff identified, wrote, and managed grants. They took the lead for identifying and selecting which grants to pursue, with management oversight and input. The District hired a Grants Specialist in late 2016. In the first 18 months of the job, the Grants Specialist developed numerous workflows, reports, and written procedures as resource tools for the grants program and worked closely with staff to establish communication channels and define the Grants Specialist's support role in securing and

tracking grants. The Grants Specialist works collaboratively with project staff to apply for grants, and manages the District's grant-making program and grant tracking system.

Internal Interviews and Findings

The stakeholder input process involved gathering information from District management and each department. Internal stakeholders were asked about the existing Grants Program – its successes and challenges, and their department's roles and responsibilities. They also provided recommendations for the Grants Program Strategy. Attachment 1 summarizes the findings from these interviews.

External Interviews

External interviews focused on how similar public agencies and non-profits organize grant processes and divide roles and responsibilities. Tina Stott conducted thirteen external interviews in June 2018. Interviewees included managers of both grant-seeking and grant-making programs, representatives of agencies, nonprofits and foundations, and representatives from two of the District's legislative consultants. The themes fell into three overarching categories – the Roles of the Grants Specialist, the Design of the Grants Program, and Implementation of the Grants Strategy. Attachment 1 discusses these themes in detail.

Strategic Plan

Input received from the Board on July 25, the audit, and the information obtained from the internal and external stakeholder interviews represent the foundation for developing an effective District-wide Grants Program Strategic Plan. The final strategy will also build upon the procedures already developed by the Grants Specialist, address challenges and gaps identified to date, and incorporate ideas and best practices obtained from the prior research.

FISCAL IMPACT

There is no fiscal impact associated with this report. A positive fiscal impact is expected once the Grants Program Strategic Plan is finalized and implemented to further the District's success in securing outside grants and partnerships to fulfill its mission and Measure AA commitments.

BOARD COMMITTEE REVIEW

The full Board is reviewing this item at a Study Session to solicit Board input to inform the development of the District-wide Grants Program Strategic Plan.

PUBLIC NOTICE

Public notice was provided as required by the Brown Act. No additional notice is required.

CEQA COMPLIANCE

This item is not a project subject to the California Environmental Quality Act.

NEXT STEPS

Board input received on July 25, as well as the findings from the Grants Program Audit and internal and external interviews, will inform the development of the Grants Program Strategic Plan. The Board will review the final draft of the Grants Program Strategic Plan on September 26, 2018.

ATTACHMENTS

1. Summary Memo

Responsible Department Head:

Stefan Jaskulak, Chief Financial Officer/Director of Administrative Services

Prepared by:

Melanie Askay, Grants Specialist



Midpeninsula Regional Open Space District
GRANTS PROGRAM STRATEGY

Key Findings Summary:

Grants Program Audit
Departmental Interviews
External Grant Program Interviews

10 July 2018



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INTRODUCTION

Purpose of this Document

This document contains a summary of the findings from three separate investigations:

- The Grants Program Audit. The findings derived from reviewing current systems, policies, protocols and practices. The Audit serves as the baseline for understanding the current grants program.
- Departmental Interview Findings. A summary of the key themes and findings gleaned from interviews with District staff.
- External Grant Program Interview Findings. Findings from the interviews with other agency and nonprofit grant programs and lessons that can be applied to the District's grants strategy.

The findings from the above investigations will inform the recommendations contained in the Grants Program Strategy. During the coming weeks, the Project and Management Teams will review and validate the findings of this memo, discuss the implications for the upcoming Grants Program Strategy, and confirm whether the direction suggested by these findings is the desired one.

Mel Askay, the District's Grants Specialist, was the primary contact for the consultant team, providing leadership, coordination and information. This has been a significant undertaking on her part and the consultants appreciate her responsiveness in providing information and contacts in a timely and thorough manner.

GRANTS PROGRAM AUDIT FINDINGS

The Grants Program Audit was developed through a comprehensive review of existing systems, procedures and workflows as well as findings from the departmental interviews (see page 8). The Audit provides the baseline for understanding the current Grants Program and highlights issues to be resolved within the final grants strategy.

Context

The District has experienced, and continues to experience, tremendous change and growth during the last few years, beginning in March 2014 with Measure AA's passage, and the attendant increase in the number of staff, and changes in executive leadership. During the development of this audit, the permanent General Manager was not yet selected and two Acting Assistant General Managers served on the Project Team alongside the CFO who has been in this role since he was hired. "Acting" leadership at both the General Manager and Assistant General Manager level can create some uncertainty regarding roles, levels of responsibility and authority.

In addition, with Measure AA's passage, the 25 projects that formed the rationale for the bond became grant-making priorities. However, there were and are additional projects included in the Vision Plan that are also priorities. A common theme expressed by staff is that it feels tremendous stress to deliver on all priorities while integrating almost 25 new staff into the organization that have been hired in the last three years.

Audit Findings

Audit Finding 1: The District has been successful in obtaining grants in the past.

Prior to 2016 and the establishment of the new GS position, departmental program staff identified, wrote and managed grants. They were responsible for setting their own priorities (with management oversight and input) for what grants were pursued. Grants secured from 1989-2010 for acquisition and development, resource management, and restoration equaled \$50,030,242. Grants received during this time period were tracked in an Excel spreadsheet but tracking appears to have stopped in 2010.

Audit Finding 2: Between 2010 and 2018 grants were not well-tracked, making reporting on grant success difficult.

Grants received since 2010 have not been consistently tracked in an Excel spreadsheet or database but it appears that, for the period between 2012 and 2018, grants received average about \$1,200,000 per year as indicated in the table below. Data was compiled based upon review of past audited financial statements, annual reports, annual Budget and Action Plan documents, Board resolutions and departmental files. Since FY2012-13, grants have accounted for between 0% and 5% of annual District revenue as illustrated below.

Year	Total Grant Dollars Awarded	Annual Revenue	Percent of Annual Revenue
2012-13 (FY ending March 31, 2013)	\$1,600,000	\$37,039,943	4%
2013-14 (FY ending March 31, 2014)	\$1,788,970	\$36,075,503	5%
2014-15 (FY ending March 31, 2015)	\$0	\$37,889,177	0%
2015-16 (FY ending March 31, 2016)	\$1,484,650	\$49,268,105	3%
2016-17 (FY ending June 30, 2017)	\$0	\$47,237,872	0%
2017-18 (To Date)	\$1,949,500 (approximate)	\$50,576,653 (budgeted)	4%

Audit Finding 3: Since the passage of Measure AA through the end of FY2016-17, grant revenue dropped but FY2017-18 shows grant revenue increasing with the establishment of the Grants Program.

Since the passage of Measure AA in June 2014, and prior to the Grants Program being created in January 2017, grant revenue has dropped. Annual grant revenue for 2014 through 2017 averages approximately \$500,000 per year as records indicate that no grants were received in 2014-15 and in 2016-17. This drop is presumably due to staff being focused primarily on Measure AA project delivery. In FY2017-18, since the establishment of the Grants Program, the total dollar amount of grants received has exceeded grants received in any of the prior five years. This may be due to increased grant-seeking activity and/or a combination of better tracking and/or advantageous timing of grant income.

Audit Finding 4: District priorities for potential grant funding are articulated in the Vision Plan and the 25 Measure AA Projects.

The District's priorities are articulated in the Vision Plan and the 25 Measure AA projects. On an annual basis, projects identified in the aforementioned documents are broken down and detailed in the Budget and Action Plan. The budget and action plan are developed over a six-month period by staff and Board

and establish the District's project priorities for the coming one and three years and therefore, dictate the broadest priorities for grant funding. These projects will influence the GS's grant-seeking priorities for the coming year. The challenge is to determine which of these priority projects are most suitable for grant funding

Audit Finding 5: Establishing and integrating the Grants Program has been a complex process.

The GS was hired in January 2017. This is a completely new position at the District. While the GS had experience working in a grant-giving role at the S. D. Bechtel, Jr. Foundation, she has never held a grant-seeking role in a nonprofit or an agency. So both the GS and the District have experienced significant learning curves as they try to integrate this new role into the complex world of the District during a time of change and leadership flux.

Audit Finding 6: The Grants Specialist has created new processes and procedures to allow the Grants Program to function.

In the first 18 months of this new job, the GS has developed numerous workflows, reports, and written procedures that both document how she is doing the job and inform others so that they could better understand how to engage with this new role. In addition to developing processes and procedures, the GS has also worked collaboratively with project staff to apply for grants, and has taken on management of the District's grant-making program.

The GS has dissected the District's internal communication systems, developed a logical system for seeking grants and created the communication vehicles to inform staff about these systems. These systems include detailed workflows and identifying existing and new ways to gather information about projects that could/would require funding. She has had to develop both the formal and informal systems for keeping and being informed. Processes and procedures developed by the GS over the past 18 months to support the grants program include:

- Defining and conveying the goals and desired outcomes of the District's grants program to the Board and staff.
- Development of GS and staff roles related to grant seeking.
- Development of grant selection criteria.
- Development of grant program fact sheets.
- Establishment of the Amplifund grants tracking database.
- Development of a grant opportunity database.
- Development of communication channels between project staff and GS to learn about new and ongoing projects.
- Development of grants workflow diagrams illustrating roles and responsibilities related to grant identification, application, acceptance, monitoring, reimbursement and amendment.

Audit Finding 7: The Grant Specialist's interface with project staff could be expanded.

As a new role within the District, the grants program is seen by some staff as another newly added priority, with a workload component that can sometimes be seen as onerous and of questionable value. With the establishment of the GS position, some program staff expressed concern that it adds another layer of complexity to developing grants as they need to coordinate their efforts with the GS, including educating her about their work and the specific projects that require funding.

What became apparent during the audit is that the GS had not participated in many of the regular, established meetings that were the District's method of setting priorities, sharing information, and changing action plans and budgets. This is likely due to the program and the position being new to the District and the GS not having a clear understanding of which meetings were most important to attend. Not participating in these meetings meant that the GS was operating with less than complete information and her work was perceived by some as an addition to the already overflowing priorities and responsibilities of project staff.

Through the interviews conducted during the planning process, management and project staff identified important existing channels of communication that would allow for seamless incorporation of the GS into the project work thereby reducing redundancy and increasing the effectiveness and integration of the grants program and the GS's role within the District. However, what is not yet established is internal agreement and acceptance of the priority that grant seeking should assume in terms of staff time and attention.

Audit Finding 8: Since the establishment of the Grants Program, there has been an increase in grants applied for and received.

In the past 18-months, the GS has worked closely with project managers to submit nine grants of which five were received totaling approximately \$2,200,000. The District also assisted partner agencies in developing two proposals for projects where the District will be a beneficiary.

Audit Finding 9: As the Grants Program becomes established, the Grant Specialist will have more time to devote to grant-seeking.

The GS prepared an overview of the percent of time she has spent and expects to spend on various grant-related duties. This time audit indicates that the GS' areas of focus have changed over the past year and one half. Early on, the majority of her time was spent clarifying and defining the grants program; currently her time is focused on guiding the Grants Program Strategy to its completion. Future roles will likely be focused on identification of grant opportunities, coordination with project staff, and writing and administering grants.

With the passage of Prop 68, effort will need to be focused on identifying and seeking grants from this pot of funding in order to secure as much funding as possible. Ideas for how to grow and deploy additional resources will be included in the Grants Program Strategy, informed by information gleaned from the case studies about how other nonprofit and public agencies have grown their grants programs.

DEPARTMENTAL INTERVIEW FINDINGS

Internal Stakeholder Input Process

The stakeholder input process involved gathering information from District management as well as from each District department. Internal stakeholders were asked about the existing Grants Program – its successes and challenges and their department's roles and responsibilities. They also provided their recommendations for the Grants Program Strategy

Management Team Hopes and Concerns for the Grants Strategy

At its meeting on April 26, 2018, the Management Team was given a briefing on the Grants Program Strategy including goals, timeline and the roles of their team. Each attendee was asked about their

hopes and concerns about the strategy. Most of the themes below came up again in the departmental interviews and are expanded upon in the next section.

- Improve efficiencies and develop a clear process
- Ensure realistic timelines and consider staff capacity
- Understand grant funding needs
- Understand grant requirements in advance to evaluate return on investment and the compliance issues inherent in each grant.

Key Internal Interview Findings

Ten findings emerged from the interviews that will help define and structure an effective and efficient Grants Program.

Interview Finding 1. The addition of a Grants Specialist has improved the grants process.

Filling the newly created GS position has resulted in improvements to the way grants are handled at the District. Some respondents felt that the GS would be more effective if the position was located differently within the organization or if there was a different reporting structure for the position. Others felt that housing the position in Administrative Services, reporting to the CFO, was the appropriate location for efficiency and ensuring that financial considerations are at the forefront.

Interview Finding 2. Staff have concerns about the grants process based upon experience with prior grants.

- The District has applied for and received numerous grants in the past – mostly for acquisition and capital projects. Prior to the hiring of the GS, each department was responsible for identifying, applying for and tracking its own grants and is now accustomed to these roles, despite concerns with the amount of work this takes. Staff experiences with past grants and procedures (or lack thereof) have led to a number of concerns about the Grants Program including what should be avoided. Grants should not drive projects.
- The Grants Program will require more time from staff.
- Grant tracking and reporting is costly and time-consuming; some grants should not be pursued because of this. The process for those that are pursued needs to be clarified and streamlined.
- The Grants Program should avoid competing for funding with partner agencies, and instead collaborate on joint grant applications if possible.
- We are too well-funded to be competitive.

Interview Finding 3. Larger organizational issues need to be considered in Strategy development.

Every interview included some discussion of the District's work environment. Some of the most frequently mentioned challenges included staff turnover, the rapid growth of the organization due to Measure AA, staff being at or beyond capacity, and the challenge of not having permanent leadership. One person noted that The District is in a transition period.

Project staff noted that project timelines are much shorter than they used to be. This not only poses a challenge for staff needing to meet deadlines but was also perceived to be a challenge for seeking grants. Interviewees noted that it is difficult to find grant funding quickly enough to meet the project

schedule and conversely, if funding is found, it may cause a delay in project completion. Some felt that if grants were considered in the budgeting process it could provide a reason for extending a project's schedule.

Interview Finding 4. A clear process for information sharing and communication is needed.

Every group interviewed noted that a significant challenge in developing the Strategy is developing a clear, consistent process for sharing information. Information sharing poses a two-way challenge. Project staff noted that it is hard to know enough about potential grant opportunities and the types of projects that might fit with certain grants. Conversely, project staff also noted that it is important for the GS to clearly understand each project and the work programs of each department.

In order for both the GS and project staff to become more aware of grants and projects, most interviewees felt that it was very important for the GS to attend departmental and Project Management meetings on a regular basis (monthly, bi-monthly, quarterly) to discuss current projects and possible grant funding opportunities.

Interview Finding 5. The Grants Specialist should be engaged in the budget development process.

The annual budget development process establishes priorities for the coming year. The process includes project review and scoping, and development of a capital improvement and action plan and a supporting budget. The process includes extensive Board involvement with the final result of the six-month process being development of the upcoming fiscal year's operating budget and a three-year Capital Improvement and Action Plan.

The GS has not been a part of this process, however, interviewees noted that this is the most important place for the GS to be engaged. The action plan and budget meetings are where projects are defined, budgets are developed, and funding needs become clear. Participation by the GS would allow her to build an understanding of the coming year's project priorities and allow her to focus her grant identification on the District's current priorities well before the beginning of the current budget year. It would also elevate the importance of the Grants Program in the eyes of the Board and staff.

Some interviewees felt that embedding the GS into the budget development process could help extend project timelines by adding lead time to identify and seek grants. However, the Budget and CIAP development process sets focused priorities for the coming year. Grants are only considered in the one year budget if the funds have already been secured. Currently, the three-year projections are not as accurate as the one-year projections and therefore identification of grant funding three years in the future is speculative and serves as a placeholder for potential funding rather than an assured future funding source.

Interview Finding 6. The Strategy needs to refine decision-making about suitable grant funded projects.

Most interview respondents noted that the projects for which the District seeks grant funding need to be supportive of the mission – this has not always been the case with grant funded projects in the past. They noted that the priority projects for grant funding are the 54 projects in the Vision Plan, including the 25 Measure AA projects.

Beyond this many respondents noted that the annual budget and the three year Action Plan provided even more detail about the District's priorities and that these should be the grant program's overall priorities but that the biggest challenge is narrowing the budget and action plan priorities down to a few

key grant funded projects. Several interviewees noted that the challenge the District will face related to securing grant funding when the majority of Measure AA projects are completed and there is an enormous need for operational funding.

Interview Finding 7. The District needs to develop an approach to secure funding from Prop 68.

Several interviewees noted the importance of positioning the District early to develop partnerships and seek Prop 68 funding. We need to develop a high level list of projects, identify potential partners and begin to work on building those partnerships. Potential projects identified include Cloverdale Ranch and San Jose Water.

Interview Finding 8. Grants should be the right fit for the organization in terms of size, time and type.

Interviewees had many cautions about The District getting involved in grants that had so many requirements that the grant wasn't worth pursuing. There has been some experience with grants of this type where early research into grant requirements was lacking and the District ended up with a grant that felt like it cost more than it was worth. Several observations emerged from the interviews that could help set criteria for whether a grant is worth pursuing:

- Size of the grant
- Restrictions and reporting requirements and overall time commitment
- Type of grant
- Avoiding competition with partners and seek opportunities to collaborate on joint applications

Interview Finding 9. An effective strategy should include a variety of essential elements.

There were many suggestions regarding how to develop an effective strategy including articulating an annual vision and goals, developing criteria for selecting grants, establishing a pre-application review process to understand the grant requirements, ensuring that the structure of the grant program considers staff roles and responsibilities, and defining key implementation strategies and measures of success. Some of these elements have already been developed by the GS and need to be codified in the Grants Program Strategy.

- Develop a Grants Program vision and annual goals and targets
- Develop criteria and guidelines
- Initiate a pre-application review and approval process
- Build on internal opportunities and efficiencies
- Define staff roles and responsibilities
- Add external subject matter experts
- Define the Grants Program structure
- Build upon and communicate broadly the Board's support for the Grants Program and strategy
- Clarify Strategy implementation
- Define measures of success

Interview Finding 10. The District needs a clearly articulated partnership strategy.

In the District's 2018-19 Budget and Action Plan, the Grants Program is described as focusing on *"increasing grant funding for the District and deepening its relationships with external partners"*. Interviewees noted that although partnership is a value of the District, a formal process hasn't been

developed to put it into action. The Grants Program Strategy can lay the groundwork but a partnership strategy is distinct from a Grants Program Strategy.

Currently the deepest relationships are those between staff and their counterparts at other agencies and organizations in the region. These relationships are generally based upon common project/program interests. These relationships are generally longstanding and occur at the staff and management levels.

Some interviewees stated that the District needs a more formalized partnership strategy, noting that there is an unspoken protocol that moves a relationship to a partnership. Staff members at all levels generally interact with their peers in partner organizations. Although there is no formal strategy, staff members know they do not have the authority to establish a formal partnership involving joint work and/or funding. If a relationship appears to be developing into a material partnership, staff members need to elevate the relationship to management staff, the GM and potentially the Board.

Several interviewees made a distinction between project partners and funders, and the implications for the Grants Program Strategy. Some noted that, although it isn't the role of the GS to maintain and steward these functional relationships, it is important that there is a process to feed any information that is relevant to the Grants Program back to the GS.

The District's grant-making program (Small Grants Program) provides up to five grants of \$50,000 each annually. This program will be a key element in the District's ability to work with non-traditional and new partners.

EXTERNAL GRANT PROGRAM INTERVIEW FINDINGS

Introduction

Thirteen interviews were conducted in June 2018 with a variety of individuals involved in their organization's grant programs. Interviewees included managers of both grant-seeking and grant-making programs, representatives of agencies, nonprofits and foundations, and representatives of two of the District's contract lobbyists.

Several items emerged as essential elements of a successful grants program, regardless of structure, staff and support. The themes fall into three overarching categories – The Roles of the Grants Specialist, The Design of the Grants Program, and Implementation of the Grants Strategy. These themes are closely interwoven and interdependent.

The Role of the Grants Specialist

Interviewees noted five key roles the grant specialist must play:

- Understanding the projects
- Ensuring regular internal communications
- Conveying grant opportunities
- Serving the project staff
- Building strong internal relationships

The Design of the Grants Program

In response to questions regarding what works well with their Grants Programs, what they wished was a component of their Grants Program and the advice they would offer to the District as it develops its Grants Program Strategy, interviewees noted that there were five key components to designing a successful Grants Program:

- Well-defined roles and responsibilities for the GS and the project staff
- Right-sized administrative support for the Grants Program
- A dedicated system for grants tracking
- A method of identifying project priorities
- A method for making go/no go decisions on specific grants that includes project attractiveness and readiness

Implementation of the Grants Program

In terms of implementing the Grants Program, interviewees encouraged the development of procedures for rolling out the Grants Program within the District and securing support for the program at all levels. They also noted that:

- The Grants Program must evolve and change in response to evaluation.
- Direction for the Grants Program needs to come from the top.
- Realistic expectations need to be set for what the program can achieve.

Developing a Strategy for Seeking Prop 68 Funding

One of the District's lobbyists defined the strategy that the District needs to follow to be competitive for Prop 68 funding. Steps include:

- Identify two categories of projects/programs - those that are highest priority for the District and those that are less of a top priority but that can help the lobbyist be aware of them as there may be funding appropriate to these projects, even though they aren't the top priority.
- Lay out how much money we need and by when. Identify each project, its cost, our local match, any other funding, and timing.
- Establish meetings with our lobbyists and the state agencies to build awareness of projects and priorities and funding needs.
- Engage in the agency meetings where the Prop 68 grant guidelines are being developed.

CONCLUSION

The audit, and information obtained from the internal stakeholder interviews and external interviews with other grants programs represent the foundation for developing an effective grants strategy that is endorsed District-wide. The Strategy will build upon the procedures already developed by the GS, address internal stakeholder concerns and incorporate ideas and best practices obtained from the external interviews.