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Grant Identification

PURPOSE

Early identification and proactive planning are key to forecasting and capturing grant awards. This policy establishes a preplanning process that optimizes the opportunity for success when applying for a grant.

SCOPE

This policy is applicable to all city of Baltimore agencies/entities that use grant funding, as well as any other organizations for which the city serves as grantor or contributes resources. Moreover, this policy supersedes and replaces **AM 404-1 Financial Grants**, **AM 404-1-1 Applying for Grants** and **AM 404-1-2 Action upon Receiving Grant Approval**.

POLICY STATEMENT

Each city of Baltimore agency/entity that receives grant funding must form a grants management committee to support the early identification and vetting of all relevant grant opportunities. For an explanation of the grant management committees' roles and responsibilities, see **Administrative Manual (AM) Policy 413-00**, **Grants Management & Administration**.

PROCEDURE

NOTE

- Procedural items preceded by this symbol are designated as quality issues. Failure to adhere to this requirement can impact the overall quality of this policy.

- Procedural items preceded by this symbol are designated as risk issues. Failure to monitor this requirement can create an unwarranted risk.

Grants Management Committee:

1. Designates at least one individual to track all germane grant announcements, via the Internet (e.g., Grants.gov or Grantfinder.com), electronic or standard mail, by telephone, through professional contacts or other sources. This designee must:

    a. Be a member of the agency/entity's grants management committee;

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b. Create a grant record in the city's Customer Relationship Management (CRM) software immediately after identifying the candidate grant. The grants management CRM can be accessed at https://bmore.crm9.dynamics.com/main.aspx;

c. Maintain and periodically update a comprehensive listing of agency/entity specific keywords and/or search terms in SharePoint for use when searching for grants;

d. Negotiate with other agencies/entities in the event two or more entities wish to apply for the same grant. Synergistic alliances that benefit the city are encouraged;

2. Determine if the grant opportunity is a *new* or *renewal* application. For renewal applications, skip forward to **AM Policy 413-40**, **Grant Preparation & Application**;

3. Identify and track all grant opportunities that align with the organization's long-range strategic plans and/or the agency's mission as far in advance as possible;

4. Determine if the new grant application aligns with the Mayor's Priority Outcomes and/or the agency's mission. If an agency/entity wishes to apply for a grant that does not align with the Mayors' Priority Outcomes and/or the agency's mission, the grants management committee chairperson must obtain and keep on file a written exemption to this requirement from the appropriate deputy mayor;

5. Document all grant targets in the CRM database then advance to **AM Policy 413-30**, **Grant Screening and Evaluation**; also,

6. In the event the grants management committee feels additional, external support is warranted to ensure a successful grant application, refer to **AM Policy 413-00, Grants Management & Administration: Lobbying**.

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POLICY OWNER

The grants management office is responsible for all changes and/or updates to this policy.

WORKFLOW PROCESS

A flowchart displays workflow graphically, using some or all of the following process symbols.

PROCESS KEY

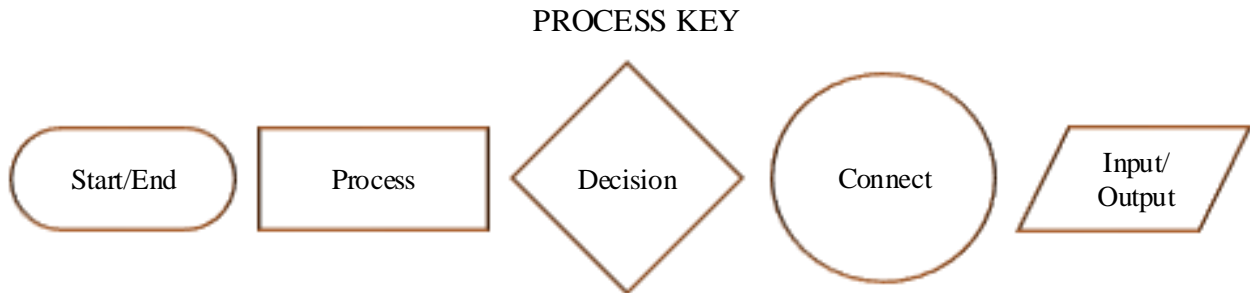| Start/End | Process | Decision | Connect | Input/Output |

Figure 1, below, graphically displays the primary steps followed in the **Grant Identification** process. As shown, new grant applications follow a dotted line path while renewal applications follow a dashed line path.
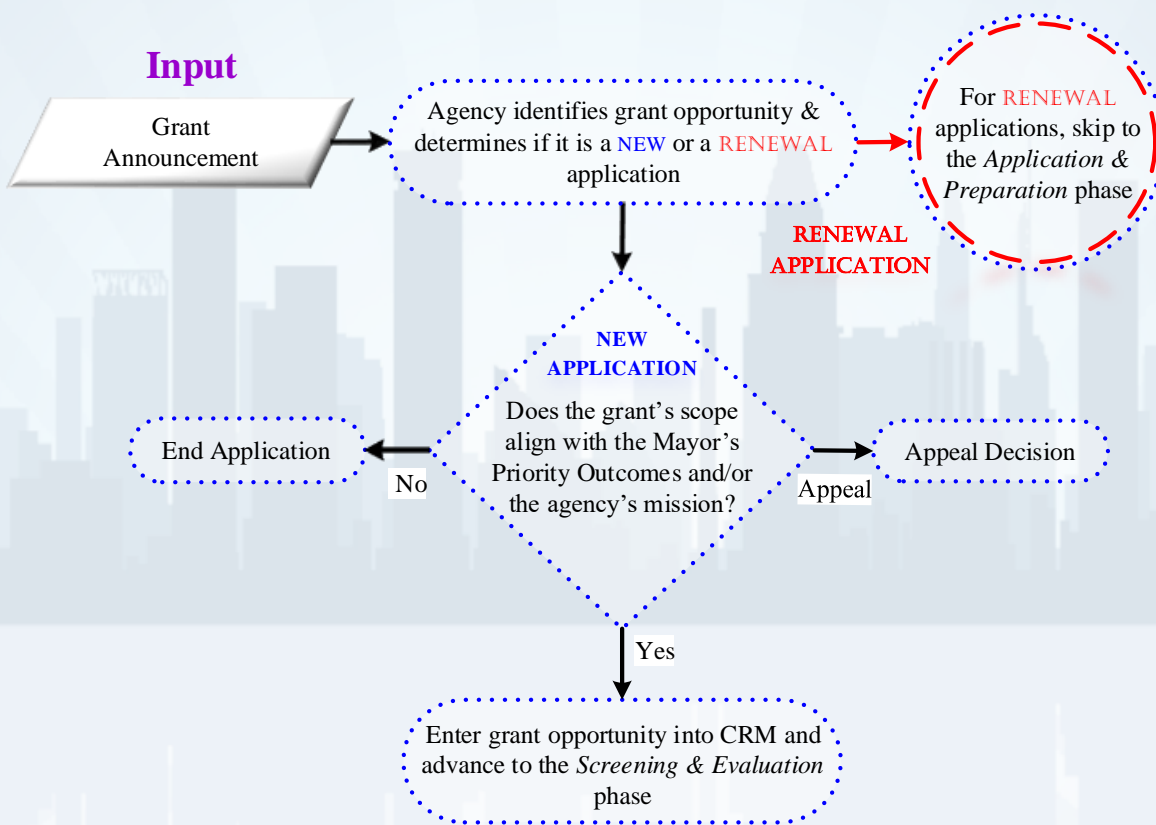
AM Policy 413-10: Grant Identification

Input

Grant Announcement

Agency identifies grant opportunity & determines if it is a NEW or a RENEWAL application

For RENEWAL applications, skip to the *Application & Preparation* phase

RENEWAL APPLICATION

NEW APPLICATION

Does the grant's scope align with the Mayor's Priority Outcomes and/or the agency's mission?

End Application

No

Appeal Decision

Appeal

Yes

Enter grant opportunity into CRM and advance to the *Screening & Evaluation* phase

Figure 1: *Grant Identification* promotes the early identification and proactive planning essential to forecasting grant opportunities and capturing awards.