National Grants Management Association

Three-Year Strategic Plan, 2013 – 2015

EXECUTIVE SUMMARY

MISSION:

The National Grants Management Association (NGMA) is the membership association leader providing resources for grants professionals and practitioners to support high levels of competency and standards of excellence.

OUR CORE VALUES:

NGMA is:

➢ A National Leader - in grants and program management and compliance matters, representing the interests of a diverse community of public and private organizations, including federal, state, and local government agencies; nonprofits; institutions of higher education; tribal entities; foundations; commercial organizations such as consulting, accounting, and law firms; and any other organization that receives or awards grants or supports that process. The industry seeks out our opinion; we are major players in shaping policy and national trends;

➢ Dedicated to Excellence and Inclusion - delivering programs and services to foster and strengthen the dynamic relationships between and among representatives of grantmaking agencies and grant recipients, including grants management specialists, program analysts, sponsored program directors, program directors, grants management officers, grant coordinators, grant developers, project directors, auditors, finance officers, policy developers, grant accountants, and attorneys; and

➢ Learning and Growing - committed to offering a variety of learning mechanisms to increase the knowledge and skills of its members and other grant stakeholders, including member and industry networking opportunities; timely and practical communications and publications; web-based and live training events; a content-rich and forward-looking annual training conference; and organizational leadership opportunities.
STRATEGIC VISION:
NGMA represents and supports the needs of all grants management professionals and stakeholders. We offer professional development and certification opportunities. We articulate standards and advance effective grants stewardship. We promote the value of effective grants management to grantor and grantee organizations.

STRATEGIC GOALS:

• Promote membership for all stakeholders in the grants management process.
• Promote professional standards, ethics, and grants management as a profession.
• Provide opportunities for education and knowledge sharing.
• Promote effective grants management at grantor and grantee organizations.
• Operate as a financially healthy nonprofit organization.
NGMA Three-Year Strategic Plan, 2013 – 2015

I. INTRODUCTION

The National Grants Management Association (NGMA) is recognized throughout the grants management industry as the membership association leader providing tools for grants professionals to support and maintain high levels of grants management competency and to establish standards of excellence for grants managers.

NGMA provides comprehensive full lifecycle grants management training, professional certification, continuing professional education, resources, and a forum for networking for grants industry professionals. NGMA serves all levels of government (federal, state, local, tribal), nonprofit organizations, foundations, institutions of higher education, and relevant private sector organizations.

NGMA supports the changing world of grants management at all levels – from grantmakers to grant recipients, subrecipients, oversight bodies, auditing professionals, and others. NGMA improves and unifies grants delivery by bringing together the professionals involved in various aspects of the process so they can learn from each other.

Collectively, NGMA members are responsible for the management of billions of dollars in grants. Representatives from all governmental and organizational types belong to NGMA, creating a diverse community, including:

- Local Government Agencies
- State Government Agencies
- Federal Government Agencies
- Tribal Governments and Entities
- Colleges and Universities
- Nonprofits
- Community- and Faith-Based Organizations
- Foundations
- Commercial Organizations

NGMA members are committed to strengthening the relationship between grantmaking agencies and grant recipients, and are professionals who work in such roles as:

- Grants Management Specialists
- Grants Management Officers
- Grant Coordinators
- Grant Developers
- Grant Administrators
- Directors of Sponsored Programs
- Budget Analysts
- Financial Managers
- Financial Analysts
- Financial Specialists
NGMA is not a grantmaking organization and does not award grants.

**NGMA CORE VALUES**

The NGMA core values are essential and enduring tenets that influence everyone in the organization and support our mission. NGMA is:

*A National Leader* - in grants and program management and compliance matters, representing the interests of a diverse community of public and private organizations, including federal, state, and local government agencies; nonprofits; institutions of higher education; tribal entities; foundations; commercial organizations such as consulting, accounting, and law firms; and any other organization that receives or awards grants or supports that process. The industry seeks out our opinion; we are major players in shaping policy and national trends;

*Dedicated to Excellence and Inclusion* - delivering programs and services to foster and strengthen the dynamic relationships between and among representatives of grantmaking agencies and grant recipients, including grants management specialists, program analysts, sponsored program directors, program directors, grants management officers, grant coordinators, grant developers, project directors, auditors, finance officers, policy developers, grant accountants, and attorneys; and

*Learning and Growing* - committed to offering a variety of learning mechanisms to increase the knowledge and skills of its members and other grant stakeholders, including member and industry networking opportunities; timely and practical communications and publications; web-based and live training events; a content-rich and forward-looking annual training conference; and organizational leadership opportunities.
II. MISSION

**Mission:** The National Grants Management Association is the membership association leader providing resources for grants professionals and practitioners to support high levels of competency and standards of excellence.

- The first part of our mission statement – providing resources for grants professionals and practitioners – underscores our commitment to offer quality training and certification opportunities to our members.
- The second part of our mission statement – to support high levels of competency and standards of excellence – promotes the professionalism and excellence for which our members will be recognized and valued across the spectrum of grantor and grantee organizations.

In support of our mission, this strategic plan covers the next three years and promotes a vision for NGMA to build upon its current momentum, following the successful establishment of a grants certification and credentialing program.

Our three major aims during this timeframe are to 1) Fully implement and support the grants management credentialing program and related training opportunities, 2) Provide a valuable set of membership benefits, and 3) Grow the membership to serve a larger portion of the grants community.

III. VISION

**Vision:** NGMA is the forum for grants management professionals to collaborate, network, and share insight on the practice of grants management. We

- represent and support the needs of all grants management professionals and stakeholders;
- offer professional development and certification opportunities;
- articulate professional standards and advance effective grants stewardship; and
- promote the value of effective grants management to grantor and grantee organizations.

This strategic plan underscores NGMA's commitment to provide its members with high-quality grants training and certification, opportunities to grow and learn, networking
opportunities, professional development, and timely information on trends and important developments in the field of grantmaking. Those efforts are underpinned by transparency and accountability from NGMA’s leadership.

IV. PLANNING IN A DYNAMIC ENVIRONMENT

Grant professionals have faced many challenges and many opportunities over the past decade, and this dynamic, changing environment is likely to continue. The number of laws and regulations affecting grants management increased, most dramatically with the passage of the Federal Funding Accountability and Transparency Act (FFATA) of 2006 and the American Recovery and Reinvestment Act (ARRA) of 2009. FFATA led to greater transparency of subrecipient funding and ARRA has proven that quarterly reporting is the wave of the future.

New oversight processes and mechanisms are being promulgated such as the Recovery Act Accountability and Transparency Board (RATB), which has been highly successful creating transparent websites, routinely refreshed data, new tools, and insightful reports. As a direct result of this success, the White House established the Government Accountability and Transparency Board (GATB) in August 2011 to provide ongoing oversight and management of federal grants and contracts.

Efforts by federal grants professionals to address the Federal Grants Streamlining Initiative and to sustain the momentum of PL 106-107 continue to result in changes to the grants landscape. The Grants Policy Committee and the Grants Executive Board were merged into the Council on Federal Assistance Reform in 2011, which created a new governance body on federal grantmaking. In addition, the U.S. Office of Personnel Management established a Grants Management job series in 2011, which is expected to bring greater visibility to the number of grants professionals throughout the federal government and create greater professional requirements and standards for the profession, similar to accounting and contracting professions.

Reports such as the U.S. Government Accountability Office’s (June 2011) "Federal Grants: Improvements Needed in Oversight and Accountability Processes" and the American Council of Technology/Industry Advisory Council’s (July 2011) "Industry Survey of Challenges to Improve Federal Grants Management" also have focused attention on the
grants profession.

These and other events are indicative of the ever-changing grants landscape and the challenges grants professionals face in dealing with evolving laws, regulations, policies, procedures, and practices. A flexible, robust, leading-edge professional association such as NGMA must be both proactive and reactive at creating opportunities for its membership to be prepared.

V. STRATEGIC GOALS

The five strategic goals below grow from NGMA’s mission and our expectations for leadership and excellence in carrying out that mission:

• Promote membership for all stakeholders in the grants management process.
• Promote professional standards, ethics, and grants management as a profession.
• Provide opportunities for education and knowledge sharing.
• Promote effective grants management at grantor and grantee organizations.
• Operate as a financially healthy nonprofit organization.

These goals underpin all NGMA activities and apply to the entire portfolio of NGMA offerings. They stem from our commitment to our membership to be the industry leader across the spectrum of grants management, from pre-award to award, post-award, and closeout.

VI. STRATEGIC OBJECTIVES

• GOAL: PROMOTE MEMBERSHIP FOR ALL STAKEHOLDERS IN THE GRANTS MANAGEMENT PROCESS

Promote membership for all stakeholders in the grants management process emphasizes two key objectives of the next three years: 1) significantly increasing the size of the organization’s membership, and 2) ensuring diverse participation from local, state, federal, and private grantors, and from grantseekers at all phases of the grant lifecycle.

Objectives:
✓ Develop member benefits for individuals and groups, resulting in high renewal rates and expanded national membership that represents all industry segments
✓ Develop initiatives to identify and recruit new members from grantee and grantor organizations in all market segments
✓ Monitor geographic and functional diversity and, to the extent possible, attract members from all aspects of grants management

TARGET: Diverse membership growth by 10% annually between 2013 and 2015

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<td>• 2013: Prioritize membership targets (e.g., by geography, role in the grants process, organization type); develop and implement targeted outreach plans</td>
<td>• 2014: Develop and implement member retention plan; develop and implement member “recapture” plan; support establishment of local chapters</td>
<td>• 2015: Issue regular online surveys and evaluations to assess value of and satisfaction with member benefits and NGMA offerings (e.g., training programs); develop plans to improve or expand benefits and offerings as warranted</td>
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• GOAL: PROMOTE PROFESSIONAL STANDARDS, ETHICS, AND GRANTS MANAGEMENT AS A PROFESSION

*Promote professional standards, ethics, and grants management as a profession* emphases NGMA’s commitment to fostering integrity in the grants industry and providing high-quality, high-value, accredited professional development opportunities.

Objectives:
✓ Further develop the Grants Management Body of Knowledge (GMBoK) and update it as industry evolution dictates
✓ Establish Standards of Conduct and a Code of Ethics for the grants management industry
✓ Promote and support the administration and maintenance of the Certified Grants Management Specialist™ (CGMS) Credentialing Program

TARGET: NGMA’s standards of conduct, the GMBoK, and the CGMS Credentialing Program become nationally recognized and widely respected standards for the industry

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<td>• 2013: Draft and publicize Standards of Conduct and a Code of Ethics; promote the CGMS Credentialing Program</td>
<td>• 2014: Maintain the GMBoK; support the CGMS Commission’s maintenance of the CGMS exam</td>
<td>• 2015: Track industry trends and practices and update GMBoK, ethics documents, and NGMA offerings as warranted</td>
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GOAL: PROVIDE OPPORTUNITIES FOR EDUCATION AND KNOWLEDGE SHARING

Provide opportunities for education and knowledge sharing emphasizes NGMA’s commitment to offer live and virtual training opportunities for professional development, knowledge sharing, and the acquisition of Continuing Professional Education (CPE) credits.

Objectives:
- Develop training and study materials to support acquisition and maintenance of CGMS credential
- Maintain and expand continuing education accreditation
- Focus the content of the Annual Grants Training Conference on best practices and knowledge sharing across all roles and phases of the grants management process
- Host regular live and virtual training events led by subject matter experts and leaders from all levels of grants management
- Establish regular use of the NGMA website by members for knowledge sharing and collaboration
- Leverage partnerships with grant industry leaders to provide valuable and affordable grant products and services to NGMA members

TARGET: Expand training offerings and substantially increase participation

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<td>• 2013: Obtain and implement technology necessary for NGMA to apply for approval as sponsor of CPEs for Group Internet Based Programs; Develop and implement plan to drive usage of members-only section of website</td>
<td>• 2014: Expand roster of NGMA-vetted grants experts to develop and deliver trainings; Develop plan for regional training events</td>
<td>• 2015: Explore requirements for offering additional types of continuing education credits; Evaluate training needs of NGMA members and grants community and update or develop trainings as warranted</td>
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GOAL: PROMOTE EFFECTIVE GRANTS MANAGEMENT AT GRANTOR AND GRANTEE ORGANIZATIONS

Promote effective grants management at grantor and grantee organizations emphasizes NGMA’s objectives related to increasing the organization’s name recognition and stature within the grants community.

Objectives:
- Participate in federal grant-related policymaking and recommend improvements to
grants management

✓ Market effective grants management practices to NGMA members and others involved in the leadership, programmatic, and/or administrative aspects of grants management

✓ Build networks between NGMA and other professional and government organizations to convey the importance of excellence in grants management

TARGET: NGMA becomes the professional association for grant practitioners

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<td>• 2013: Launch a national marketing campaign targeting grant professionals; Pursue opportunities for strategic collaboration with other organizations on training events and other initiatives</td>
<td>• 2014: Implement targeted campaigns to increase memberships, corporate partners, and other strategic relationships</td>
<td>• 2015: Evaluate organization’s name recognition and reputation in the grants community; pursue additional opportunities with professional and government organizations</td>
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• GOAL: OPERATE AS A FINANCIALLY HEALTHY NONPROFIT ORGANIZATION

Operate as a financially healthy nonprofit organization emphasizes NGMA’s commitment to be financially transparent and accountable to its membership.

Objectives:

✓ Obtain periodic financial reviews that are free of findings

✓ Develop a revenue enhancement plan that addresses current revenue streams, identifies improvements, and outlines new revenue opportunities

✓ Allocate resources based on priority goals and objectives

✓ Judiciously contribute to financial reserves for future program development and for the organization’s long-term financial stability

TARGET: Transparent operations with financial statements that are independently audited on an annual basis and 20% increase in annual revenue between 2013 and 2015

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<td>• 2013: Obtain financial review, and share results with the membership; Develop new revenue streams</td>
<td>• 2014: Remediate any corrective actions; Stabilize and maintain new revenue streams</td>
<td>• 2015: Receive “clean” financial review; Evaluate organization’s financial health and plans</td>
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VII. EVALUATION AND ASSESSMENT

All training events will include evaluations by participants, to ensure the quality and value of NGMA trainings and to comply with the requirements of the accrediting organization that approves NGMA as a sponsor of CPE credits.

The NGMA Board of Directors will monitor the NGMA infrastructure needed to support this Strategic Plan, which will be updated three years after it is released. The Board will regularly evaluate and report on the progress of the organization against the goals specified in the Strategic Plan.

NGMA members, Corporate Alliance Partnership Program participants, and other partners and associates will be invited to recommend improvements to the Association’s offerings and operations.