Podcast Transcript
How Penitus and Collier County used SCN For Their Grants Management Project
An SCN Community Podcast
Hosted by Jon Reed of JonERP.com
Podcast Interview Date: March 30, 2010

Jon Reed: Welcome to this SAP Community podcast. I'm your host, Jon Reed, of JonERP.com and joining me today is Freddy Guerrero, principal partner at Penitus Global Solutions, and Marlene Foord and Kelly Jones of the Collier County SAP Project. We're here to talk about a recent implementation of grants functionality they did at Collier, the lessons learned and how Penitus developed this grants functionality through the involvement with the SAP Community Network. We're going to start the podcast with Freddy to give us a sense of how this grants functionality originated.

Freddy, it's nice to have you back for another podcast. You specifically developed this Penitus grants functionality in collaboration on the SAP Community Network. Can you tell us how you did that?

Freddy Guerrero: We used the SAP Community Network, the Business Objects Community and the SAP EcoHub to develop our solutions, which are the products we present to the EcoHub and to our future customers searching for solutions.

We also worked with the SAP Community Network and the Business Objects Community to find ways of solving issues regarding any Business Objects problems and issues we may have. That way, we can resolve them quickly, without having to spend too much time on it. For something that would normally take a couple weeks to resolve, we just quickly tap into the SAP Community Network to find solutions; therefore, we can provide better services to our customers and provide products that we can deliver to other communities like the SAP EcoHub.

Reed: What role did EcoHub play developing and sharing your grants solution?

Guerrero: The EcoHub helped us by putting out products and having customers do a search in our products, evaluating and eventually buying these products. Working with Collier County, we were able to get customer success stories of the solution we created and implemented at Collier County.

Reed: Thanks, Freddy. I'm going to talk with the Collier County team here for a few minutes and find out how you did taking this functionality live. Marlene and Kelly, tell us about your roles on the Collier project.

Marlene Foord: I am the Grants Coordinator for Collier County. I work with all of the departments to mainly assist with the pre-award process if they're looking for grants or applying for grants. I make sure we get the internal approvals necessary, and I also work with them after they've gotten the grant award to ensure that we do all of the management, compliance and tracking that is necessary post-award.

For this particular project, my goal was to get everyone on the same page as much as possible so we could develop a system that would work for all of us for the pre-award and post-award process.

Kelly Jones: I'm an accountant with the Finance Department here at Collier County. I'm responsible for the day-to-day accounting functions for all of the county's financial responsibilities, as well as the single audit. For this project, I was the functional lead for Grants Management, so I wanted to make sure that everything Marlene was trying to do with the different departments and all of that coordination and effort then led to a successful single audit, and that all the needs we had for that project had been met. I was also responsible for making sure the integration worked within the rest of SAP, especially with the funds management module and the budget constraints we have.

Reed: Kelly, that sets the stage for the next question, which is the SAP products that you are running and how your organization relies on SAP.

Jones: Collier County is currently on ECC 6.0. We are using the FI, CO, FM, MM, HR and PS modules, and we're also running the NetWeaver Portals with Resource Portfolio Management and cProjects, cFolders and BI. Up until a few years ago, I would say Collier County has basically been using basic standard SAP functionality. We've been able to pay our people, pay our vendors, requisitions, control budgets, prepare financial statements.

With the implementation and integration of Resource and Portfolio Management and Business Intelligence, we have really opened the door for providing real tools for the day-to-day needs of our project managers - and now our grant managers.

Reed: Marlene, can you give our listeners a sense of why this grants solution from Penitus is important to what you're trying to do?

Foord: We started just about four years ago with a core group, which we called our working group, to come up with the needs we have in the agency from all of our departments. That's including our support departments, the finance office, human resources, purchasing, the grant coordination office, our office and records management, just to name a few. We wanted to come up with a list of things we thought would be important if we had a system, and we started to do a little bit of research to see what was out there.

At the same time, we had our SAP system for financial management and were starting to broaden that use a little bit. For managing the pre-award aspects of our grants, all we had was an Access database. That database really was very limited to keeping track of the grants we received, how much each grant was, who it was from and how long the grant was going to last. It really wasn't robust enough for us to manage the various compliance aspects of the grant.

Our goal was to see if we could put the two together somehow and look at the grants in a financial system more from the lifecycle perspective. Taking the various items we identified as needs for pre-award process and post-award process, we put it all together and worked with Penitus to come up with a system.

Now we are able to enter our grant at the proposal stage, take it all the way through the internal review process, the approval process, create the budget for the grant, and we can think about the budget from the grantor perspective, as well as our own SAP and financial management perspectives, which is very critical. When the grant is awarded, we've already done all the hard work; it's just a quick push of the button to create the grant in the financial system. We were also very pleased to have some tools developed for us, like dashboards and task systems that helped us during the implementation and oversight of the grant itself.

Reed: The pre-awards piece is part of the challenge here, right? You have pre-awards information that's important, but it's not necessarily always integrated with the grant system or the post-award system - or the ERP system, for that matter. Is this something you think a lot of organizations are probably struggling with?

Foord: I do know from the communications that we started years ago that it is very important that when you apply for a grant, you have internal processes that surround the application of the grant and the committal of the grant. You have to really think about it from the final awarded grant perspective as much as possible, and that's not easy to do because things do change from the time you apply for the grant to the time you receive the grant.

This is really forcing us to think about these grants ahead of time in a much bigger way, a much more detailed way, so we're prepared when we actually receive the grant. Of course, there is a lot of flexibility so we can adjust things when we get to the point when there's a grant to award.

Reed: What lessons have you learned from this grants implementation that you think are relevant for our listeners?

Foord: One of the things we realized early on is that the lifecycle of the grant is really important to understand, and there are a lot of people that need to be involved. You have the grant writer putting the grant application together, plus the writer's supervisor. That's the pre-award part of it.

Those two people have to work with their fiscal staff and the people who will implement the project. It might be different: it might be an actual project manager as opposed to the grant manager, and there are a lot of other partners within that department or in that functional area. But there are other support offices that need to be involved, too, so we thought of that as the team and tried to make sure we had all the key players involved from the very start.

We also realized there are a lot of distinctions from grant to grant. Even within the state system, there are very different programs, and federal grants are all very different as well; how to actually implement them is different from grant to grant. We were really keen on getting the people in the room as much as possible. We made sure not to rush that part of it, to give a lot of thought to it, and to add to our group of people as necessary with other insight because there are others who were outside of our core group that we wanted to bring in at various times.

Those were important lessons that we learned. Being flexible and keeping the larger perspective of the grant in mind, rather than just applying for a grant or managing the fiscal aspects of the grant.

Reed: In terms of the dashboarding, you think about how users are going to access this functionality. How did you integrate that part into the project?

Jones: We have users accessing the solution through the portal, so folks who are not as comfortable with standard core SAP have a little more user friendly way to access this information. They go into the RPM solution, and they can develop their proposal budget just like they would normally do on an Excel spreadsheet or in a Word document or sometimes even with pencil and paper. Now they can actually see that grant proposal or application go through the various decision points and through the process.

Once that grant is awarded, Grant Manager can then run standard SAP reports through the portal, so we haven't forced those folks to go back into the core SAP system. They're really happy with that; that was something they really liked. These reports now mirror the grant reporting requirements. However they need to report back to that grantor agency, the reports are coming out of the system looking very similar to that, so they are able to generate their reimbursement requests very easily, and we have the audit trail to support it, which is very important to us.

The one thing I think was really key out of this whole project was this Task Manager. We have had more positive feedback from that than anything else we did. With this custom Task Manager, grant managers can keep track of any task they can think of on a grant. It could be a quarterly report, it could be a reminder to submit or call someone on a specific date, etc.

Anything they need to track on their grant, they can do with this Task Manager. They can also assign tasks to other folks, either within our agency or outside of our agency. They can then look on the dashboard for those tasks to see where they're at in the process and what kind of progress is being made on those tasks: in progress, almost complete, not even started yet. So they really now have a true management tool to help with grant management.

Many of them told us if it was just going to be an extra step they had to do, it wasn't really going to help them much. But with this Task Manager, they're starting to see real benefit from it. That was pretty exciting to us.

Reed: Listening to you talk, there were a few lessons that stood out for me. One was getting stakeholders in the room and involved so they don't get any surprises later and have input. The other was visibility. Also, giving users information in the form that's most useful to them, as opposed to making them go somewhere else for it. Finally, give them tools like task management so they feel like they're saving time, not just learning something new that they might not have time for. Where there any lessons I missed that you wanted to let our listeners know about?

Foord: Use or acceptance is key, and it's just like any other SAP project: the terminology is different and it's new functionality.

Jones: We also had new people involved in this process than we previously had involved in SAP or any of the project management because we're looking at grants from a project management perspective. We've always done that on some level, but now we're kind of forcing it with a tool as well. It's new to people, but they're starting to accept it and we're continuing to work with them.

Reed: I suppose any change like that is going to be gradual, but it sounds like you are on the right track. Freddy, were there some key points you took away from that discussion?
Guerrero: I would like to encourage everyone to get involved in the SAP Community Network. By doing this, you will learn faster by finding solutions to the problems. It will also give you the ability to share some of the experiences with other users. It will also promote solutions to the products using the SAP Community Network, like the SAP EcoHub. Finally, I recommend using all the components, like the Business Objects Community and the SAP EcoHub.

Reed: One thing I wanted to mention to our listeners is that all the parties on this call are going to be at ASUG Sapphire 2010, so you can look for them there and follow up on some of the solutions that have been discussed today. With that, I wanted to thank all of you - Freddy, Marlene and Kelly - for taking the time to share this collaborative story with us.

Before we sign off, I want to make sure that our listeners know how to access the Business Objects Community as well as SCN. The direct URL for the Business Objects Community is [boc.sap.com](boc.sap.com). If you are already a member of BPX or SDN, you can access the BOC through the main horizontal menu. If you are not yet registered with SAP's online communities, you can register for all three of those communities at the same time. I'd like to thank our listeners for joining us today for this SAP Community Network podcast. This is Jon Reed of JonERP.com signing off. We'll see you online soon at scn.sap.com.