

# Chicago Department of Public Health transforms grants management with CA Clarity On Demand

## Benefit Summary

### Business Overview

The Chicago Department of Public Health (CDPH) provides a wide range of health services to the third-largest city in America. CDPH relies on various grants to fund a large portion of its programs and activities; its grants management team consists of six staff members, who track the agency's grants through the full funding lifecycle.

### Challenge

Inability to manage the full grants lifecycle prevented CDPH from responding quickly to emerging issues. The agency's approach to grants management also resulted in 'carryover' requests of roughly 10 percent of annual grant funding, which risked the loss of these sums from the following year's grants allocations. CDPH needed a grants management solution that would reduce carry-over and optimize the full funding lifecycle.

### Solution

Use CA Clarity On Demand – configured for grants management – to enable CDPH to control the full lifecycle of all their grants, and meet all performance tracking and reporting requirements.

### Result

CDPH can identify early in the grants lifecycle any budgeted funds that are not going to be used, and redirect those dollars to other services. CA Clarity On Demand enables CDPH to reduce carryover losses, act quickly and circumvent delays, and ensure that citizens benefit from the program funds as intended.



#### Customer Profile

Industry: Local Government  
Agency: Chicago Department of  
Public Health

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Carlo Govia  
First Deputy Commissioner and Chief  
Financial Officer,  
Chicago Department of Public Health

## Business Overview

### Meeting health services needs for America's third-largest city

The Chicago Department of Public Health (CDPH) provides a wide range of health services to the third-largest city in America. CDPH relies on various grants to fund a large portion of its programs and activities; its grants management team consists of six staff members, who track the agency's grants through the full funding lifecycle.

At CDPH, grants are managed in five phases:

**Ideation** – Finance staff finds and researches potential grants, querying program directors responsible for service delivery to find out which grants the program directors want to pursue.

**Application** – Once the decision is made to pursue a grant, the finance division develops a budget for and applies for the grant.

**Award** – When the application is approved and the award received, the budget is adjusted based on whether the award is more than or less than the application amount.

**Implementation** – During implementation, the division responsible for the delivery of the service carries out the grant objective, requisitioning the finance division for expenses.

**Closeout** – At the end of the grant year, the finance division gathers all of the details on outstanding requisitions, unspent funds and other details, and sends closeout reports to the grantor.

## Challenge

### Reduce carryover losses, make full use of all funds

Applying for and managing grants funding has emerged as a top priority for many state and local government agencies. With tax revenues declining in a "down" economy, grants associated with the American Recovery and Reinvestment Act of 2009 and other programs have become an important source of funds for government agencies.

However, stiff reporting requirements and tight application deadlines attached to stimulus funding and other grants will require more sophisticated solutions for managing government funding streams, and tracking the requirements associated with them.

A further challenge is to reduce the number of requests to "carry over" unspent funds to the following year. Carryover requests are a problem because they can jeopardize future grant awards. If an agency doesn't use all of its awarded funds one year, the award will likely be reduced the following year. As a grant moves through the phases of its life cycle, a variety of factors can cause the agency to finish the grant year with funds unspent.

For example, a change in the award amount would require budget revisions. If not carefully tracked, those revisions can impact the procurement of necessary equipment, delaying the project and resulting in unfinished work and unspent funds at the end of the year.

*"In the past, things were just siloed into paper all across the department. This has been like the dawn of Aquarius for us. It's great that we are able to see our data in one place and have higher-quality information to make better management decisions."*

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Until recently, CDPH's approach to managing the grants was like many other agencies across the country. "We really were doing that on spreadsheets," says CDPH First Deputy Commissioner and Chief Financial Officer Carlo Govia. At the time, the department was requesting carryover of about 10 percent of its grant funds annually.

## Solution

### Control the full grants lifecycle

The department began searching for a tool to better manage the 70 or so grants it typically administers, and eventually settled on CA Clarity On Demand, with additional configuration for grants management. This Web-based project management solution enables CDPH to track critical timelines, spending levels and other requirements over the full lifecycle of all their grants. The new approach helps the agency anticipate trouble spots and fix them before they impact funding. As configured for CDPH, CA Clarity On Demand provides a comprehensive view that allows the agency to predict and avoid carryover requests. Since deploying the solution, CDPH has reduced its carryover requests from ten percent to one percent.

Govia says the agency looked at other grant management tools, but they were geared more toward nonprofit entities, and CDPH needed a more robust solution. "We deployed CA Clarity On Demand because we needed a comprehensive solution to get control of our grants life cycle," says Govia. "Whereas in the past, it was sort of more functional, now we think about it as more project driven."

To help coordinate these changes, CDPH has launched an agency-wide transformation that will help it take full advantage of available funding. The focus on efficient grants management is nothing new for CDPH – the department relies on grants for about two-thirds of its annual budget, so it's critical that the agency maintain or increase the amount of grant funding it receives from year to year. As part of its overall effort to streamline operations, CDPH is also integrating previously siloed processes and strengthening the management of its entire grants portfolio.

## Result

### Ensure that citizens benefit

In the past, the inability to view all of the grants in their various phases kept the agency from responding in a timely fashion to emerging issues. CDPH can now put its grants into perspective, monitoring the various phases of each grant and making decisions based on that information. This helps the agency respond with agility to changes in the project timeline, grant awards and resources available, rather than allowing the project to be delayed and needed funds left unspent at the end of the grant year. Using CA Clarity On Demand, the agency now acts quickly with comprehensive awareness of the progress of each grant, and citizens benefit from the program funds as the grant intended.

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The results are consistent with Chicago Mayor Richard M. Daley's vision of continually finding "new and better ways to manage government, provide city services and protect taxpayers" and embracing "new management practices, emerging technology and out-of-the-box thinking to deliver more efficiently the services that our people demand and our taxpayers support," as the mayor stated in 2008 when he accepted the 21st Century Commission's recommendations on improving government in the new millennium.

The results also are consistent with the guiding principles of the 21st Century Commission, including:


- Operate with a vision for the future that reaches beyond present-day issues and problems to identify and address challenges and needs for the future.
- View service to residents as its principal goal, and structure its operations to meet the needs of the people and businesses throughout Chicago.
- Drive continuous improvement in its internal operations.

Stimulus funds will be managed with Clarity just like the other grants in the CDPH portfolio, Govia says. However, because of the special reporting requirements associated with the American Recovery and Reinvestment Act of 2009, the department will build regulatory and reporting requirements into the application. "All those rules will be built into the system."

The ability to customize Clarity was one of the things that impressed him about the solution, Govia says. "Its ability to be easily configured, to add the language and the workflow for the grants management project was a driver that allowed us to select CA Clarity."

In addition to helping CDPH maintain its grant funding levels from year to year, the solution is an important piece of an overall push toward greater efficiency in the agency. Currently, staff in the finance division can access grant information in Clarity, but soon other managers in the agency will be able to view grant information, as well. An information dashboard will show budgets, actual expenses and other important data.

Data collected through Clarity already helps the finance staff target grant activities more effectively, says Govia. "We're not just blindly sourcing the market for things we're never going to use because none of our program directors are interested in those kinds of awards." The finance division can also keep better track of how much time it takes to manage a given grant, and allocate its human resources more effectively. And he says CDPH has already seen an increase in full-time equivalent productivity and efficiency.



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As the department improves its efficiency and decision-making by using integrated and automated tools, it is in a stronger position to secure more funding with which to carry out its mission of serving Chicagoans.

Says Govia, “If we can become more efficient, we can ask for more money because now we can justify that we are spending the money effectively during the grant year.”

CA Clarity On Demand, configured for grants management, has enabled the Chicago Department of Public Health to achieve the following:

- Increased transparency and accountability for ARRA requirements
- Reduced risk of wasted grant dollars by tracking consumption of funds
- Higher value to the public by aligning grants to organizational and ARRA goals

Notably, these goals were achieved with a Web-based On Demand delivery model requiring no hardware or software purchases. Apart from making it easy to get started, CA On Demand solutions are financially compelling, offer deep and broad functionality, and are secure, scalable and optimized.

Visit [ca.com/grants](http://ca.com/grants) to learn more about managing the full grants lifecycle.