



# CMB Outreach Strategy FY 2018 and Beyond

Dr. John Sholhead, Cash Management Branch Chief

**CMB**

**CASH MANAGEMENT BRANCH**

BUDGET, FINANCE AND AWARDS MANAGEMENT | DIVISION OF FINANCIAL MANAGEMENT



# Agenda

- Objectives
- Strategy
- Advantages
- State Assignment Map
- Increase Webinars
- Enhanced Grantee Outreach Over Time



# Objectives

- Get our message out to as many Grantees as possible to provide valuable detailed grants operational information to ensure a successful and rewarding grants outcome and experience
- Continue to reduce canceling funds. This number has gone down from \$9.5 million at FY15 Year-end close to \$3.9 million at FY16 Year-end close to \$2.8 million at FY17 Year-end close (open balances requiring de-obligation)
- Allow Universities to better understand Federal Financial management and the NSF grants and cash management process
- Provide a higher level of customer service by providing our grantees a visible point-of-contact to reach out to when they have questions or issues



# Strategy

- Reorganize staff duties to match the NCURA Regional mapping
- Leverage NCURA Conference to present to more universities
- Strategically design outreach visits to Colleges and Universities to
  - Annually attend 4 to 6 Regional Conferences to give all Universities equal opportunity to hear our message
  - Design outreach visits to address both size of grant dollars or size of grants to visit larger grantees but also assure every NSF grantee has had an opportunity to know who we are and understand our services (i.e. 20 percent of NSF Grantees receive 80% of NSF Grants)
- Conduct joint DIAS/DGA/DFM NCURA presentations to include Pre-Award, Award and Post Award discussion
- Monitor University saturation map to measure outreach performance



# Advantages

- Each Regional Conference has between 200 to 700 Conference attendees.  
We will:
  - Conduct Group Conference presentations for 30 to 200 Universities at one conference, plus
  - Conduct **in-reach** visits during Regional conferences to share handouts, make contact and ultimately provide increased customer service
  - Conduct local outreach in surrounding conference area
  - At the same cost as prior outreach plan
- This will allow us to reach 700 to 1,500 colleges and universities per year at the same cost

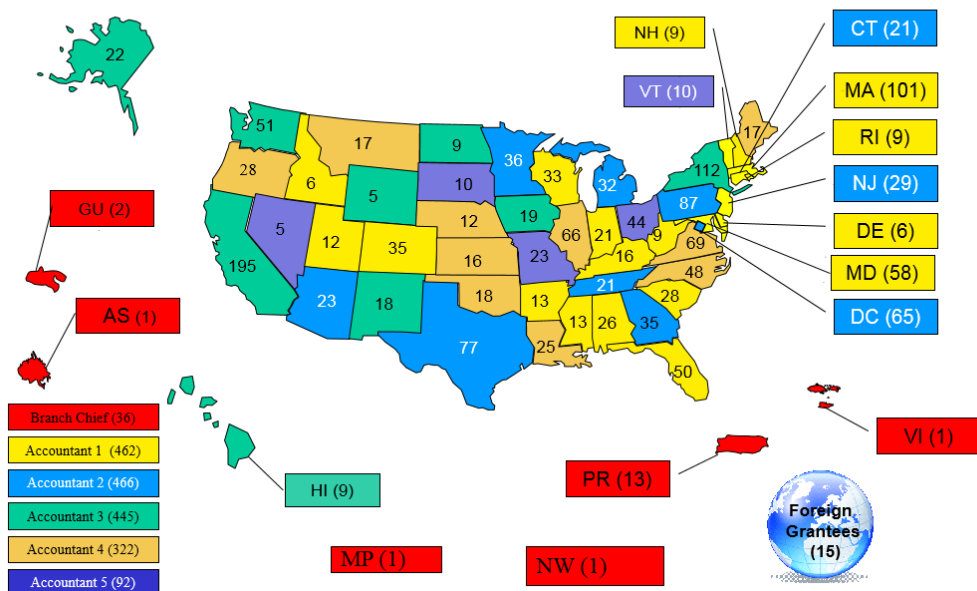


# State Assignment Map Comparison

Old New

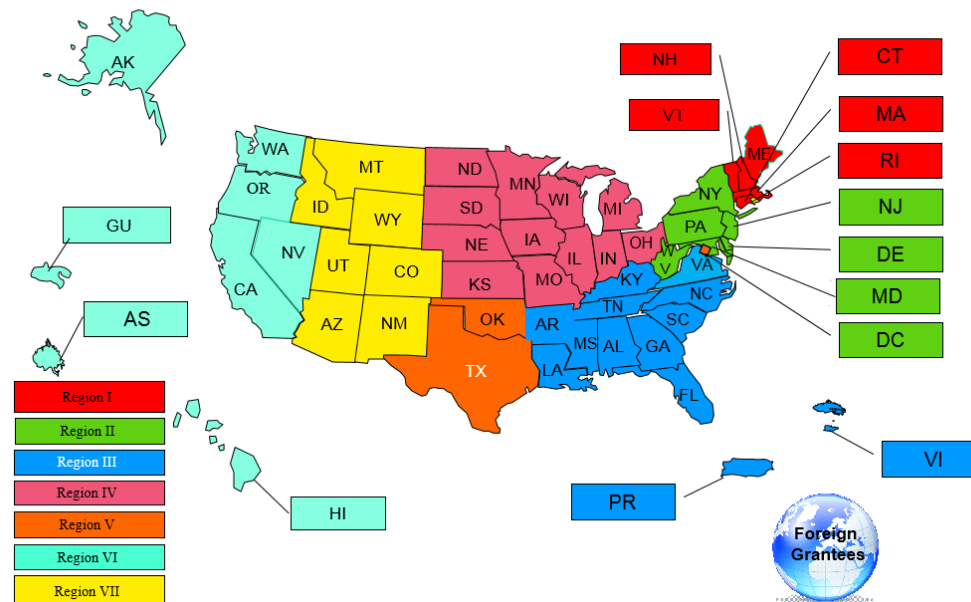
GCMS State Assignment Map

as of Feb 3, 2011  
1,823 Grantees



GCMS State Assignment Map

NCURA  
as of Nov 20, 2016



The above map shows the old state assignments versus how we are realigning our staff to the NCURA Regional map layout



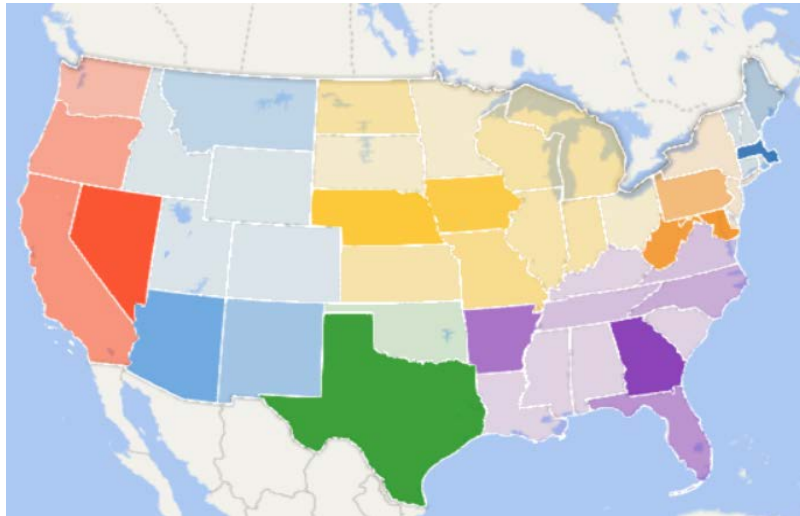
## Webinars

- New NSF Grantees (**new**)
- Canceling Funds
- Small Dollar Grantees (\$10 million and under) (**new**)
- SBIR Grantees
- Regional Based Outreach Webinar (**new**)
- Annual Cash Management Update

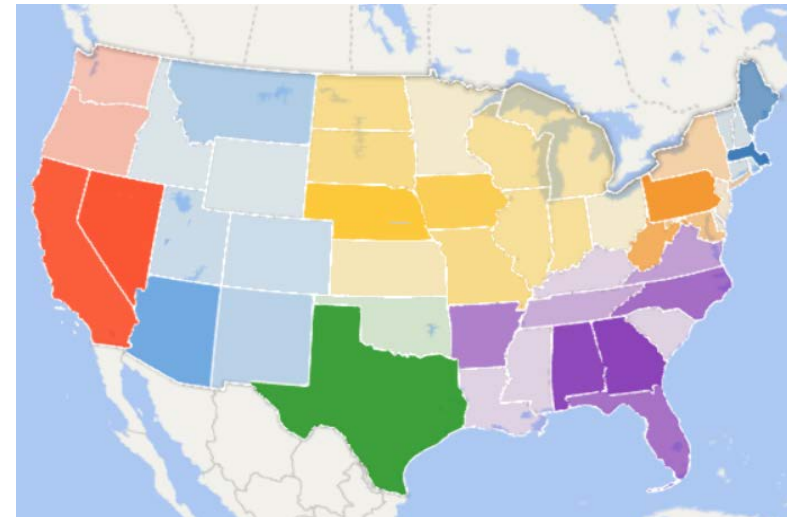


# Enhanced Grantee outreach Over time

2018



2019



Over time the heat maps above will show saturation of Universities presented to over time, ultimately providing outreach to over 90 percent of our Grantees within 3-4 years. States will darken in color over time.