

YPTC GRANT FUNDING AND MANAGEMENT SERVICES

CASE STUDIES: HOW YPTC HELPS CLIENTS SECURE AND MANAGE GRANT FUNDING



AT YPTC, our mission is to help as many nonprofits as possible grow stronger. Grant funding can help nonprofits expand and strengthen their programs and services, but it also can also bring accounting complexity and compliance obligations that demand additional finance capacity. Through our customized grant management services, YPTC helps nonprofits identify and secure funding opportunities and manage awards with the reporting discipline funders expect. We help strengthen your grant infrastructure so your team can pursue funding responsibly, protect awarded grant revenue, and maintain funder confidence over time.

CASE STUDY: GRANT COMPLIANCE RESTORATION, REVENUE RECOVERY, AND ONGOING MANAGEMENT

BUILDING CAPACITY AND INFRASTRUCTURE FOR STRONGER GRANT OVERSIGHT

THE CLIENT

THE RESEARCH DIVISION of a large nonprofit healthcare network that operates a medical center and an acute care teaching facility. The research division focuses primarily on improving health in rural communities and relies entirely on federal and state grant funding. They needed specialized support after staff turnover and limited accounting capacity weakened grant management and compliance.

THE OPPORTUNITY

- **RENEWING A LAPSED INDIRECT COST RATE AGREEMENT:** The organization initially sought help preparing a proposal to renew its expiring negotiated indirect cost rate agreement (NICRA).
- **ADDRESSING SIGNIFICANT COMPLIANCE FINDINGS:** A federal funding agency desk audit identified missing or insufficient policies and procedures, including requirements related to time and effort documentation and accounts payable approvals.
- **RECOVERING UNCLAIMED GRANT REVENUE:** Delayed reimbursement claims, fragmented grant tracking, and records that did not reconcile to the general ledger put substantial government funding at risk.

OUR APPROACH

PHASE 1: STABILIZE FUNDING AND COMPLIANCE

- **REVIEWED** award documents and the general ledger to identify urgent compliance and reimbursement gaps.
- **CONTACTED** funders to determine what options remained for recovering funding on closed awards.
- **PRIORITIZED** time-sensitive filings and assembled spending and revenue information for grant-funded projects.

PHASE 2: BUILD GRANT MANAGEMENT INFRASTRUCTURE

- **DEVELOPED** custom tracking tools for award dates, spending, available funds, and reporting deadlines.
- **REVISED** the process for recording grant revenue and related receivables.
- **ESTABLISHED** a recurring revenue reconciliation as part of the monthly close process.

PHASE 3: STRENGTHEN CONTINUITY AND TRANSITION

- **CALCULATED** the organization's next indirect cost rate submission and negotiated an extension of the existing provisional rate.
- **CLARIFIED** the sources and meaning of amounts reported in the schedule of federal awards.
- **TRANSITIONED** grant management responsibilities back to the internal team after supporting grant collections and strengthening oversight.

THE RESULTS

- **REVENUE RECOVERY:** The organization collected nearly \$10 million across its grants that otherwise would have been forfeited.
- **FEDERAL FUNDING RESTORED:** More than \$2 million in funding from a federal agency was recovered for completed work that had not yet been claimed.
- **INDIRECT COST CONTINUITY:** The next indirect cost rate was calculated, and the existing provisional rate was extended through the end of the current fiscal year.
- **CLEARER FEDERAL REPORTING:** The organization gained a better understanding of the sources and meaning of the amounts reported in its schedule of federal awards.

THE IMPACT:

STRONGER FINANCIAL STEWARDSHIP SUPPORTS THE RESEARCH MISSION. Recovering previously unclaimed revenue strengthened overall financial health. More reliable tracking, reconciliation, and reporting reduced the risk that completed grant-funded work would remain unreimbursed and gave the organization a clearer foundation for managing awards and maintaining funder confidence.



CONTACT US with questions and learn more about our grant funding and management services at <https://www.yptc.com/services/grant-funding-and-management/>