

# Expanding the Scope of Funding Opportunities

**ExLibris**  
Pivot RP



By taking advantage of Pivot, the pre-award team at Hektoen Institute tapped into a whole new world of funding sources, and brought a valuable new service to their community of researchers.



## Searching for Broader Funding Sources

By serving as fiscal agent and grant administrator, Hektoen Institute of Medicine frees researchers to focus on the scientific aspects of their projects. “We have the staff to support grant programs, and work with the investigators over the lifetime of their grants including reporting, billing, human resources, and similar functions. We take the reins on all the administrative hassles for them,” explains Rebecca Galvan, Pre-Award Grant Manager. Her team handles the grant application and submission process on behalf of the researchers, but they were looking to take on a broader role.

As Courtney Schwerin, Project Coordinator for the pre-award team, shares, “In the past, I would say 70% of our awards were federal grants. We were on all the newsletters from agencies like HRSA and the CDC, but one of the pre-award team’s goals was to expand our foundation funding. While we maintain partnerships with some foundations and have worked with them in the past, we really didn’t have a way to efficiently sift through opportunities.”



## New Funding at Their Fingertips

Hektoen uses the Cayuse suite of grants software for handling everything from pre-award preparation to post-award administration, reporting and tracking. Because of a partnership between Cayuse and Ex Libris, the pre-award team was introduced to Pivot through its integration with Cayuse. They found they had a ready source of new funding opportunities at their fingertips with Pivot, and could link those funding opportunities directly to the electronic proposal development and submission workflows in Cayuse. As Galvan recalls, “For our trial of Pivot, we chose different investigators that we already had programs with, and used them as a model on how to use Pivot. We created different searches to find what they were looking for as far as grant funding. Pivot really helped in that because it’s difficult to do 30 different searches every day and keep track of all that. Pivot consolidates everything, so we have our different program searches all in one place.”

## About Hektoen Institute of Medicine

Founded in 1943, the **Hektoen Institute** is one of the largest medical nonprofit organizations in Chicago. On behalf of local government agencies, principal investigators and nonprofit organizations, Hektoen provides the administrative infrastructure for a portfolio of grant-funded programs. These perform ground-breaking research and provide basic health services to improve health outcomes for Chicago’s most vulnerable populations.



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*Courtney Schwerin, Hektoen Institute*

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*Rebecca Galvan, Hektoen Institute*



### Instant Success with Pivot

Almost immediately after starting to use Pivot, the team found their first grant opportunity with the system and submitted a successful application. As Schwerin explains, “We have worked with Healing Hurt People, out of Cook County Health, for ten years. The program was previously completely state-funded by a couple of different organizations within the state of Illinois. The principal investigator wanted to expand her program, but there was no longer public funding available.

“We set up filters for criminal justice, youth-specific, Chicago-exclusive, et cetera, in Pivot. When I first ran the search, we found five or so awards that we qualified for, that we could apply for. The opportunity that we went for was with the Chicago Community Trust. It was a multimillion-dollar, multistage, co-award process. We got our Pivot accounts online right around the holidays, maybe October/November, and we applied for that grant in December. It was incredibly quick.”

“Pivot paid for itself right away,” echoes Galvan. Ironically, even though Hektoen gets funding from national and international sources, the funder they found was a local source and the various grant criteria were a near-perfect match for the program.



**Learn more and get in touch with us:**  
[www.exlibrisgroup.com/pivot](http://www.exlibrisgroup.com/pivot)



### New Role as Funding Finders

Pivot has allowed the pre-award team to take on a more proactive role — not just handling submissions, but identifying the funding sources. As Schwerin tells it, “Our role as the pre-award team has evolved in the last few months. Prior to Pivot, we exclusively applied for grants that our investigators brought to us. A researcher would come to us and say, ‘I know about this federal program and I want to apply for it.’ Now, with Pivot we can help them find new opportunities. They come to us and say, ‘I need more funding. But because my program is so large, I don't have the capacity to figure out that part.’ The new part of our job is identifying those opportunities and delegating all of the application process. We could not do that before. Now, with access to Pivot, we can.”



### Matching Sources to Program Specifics

As Galvan explains, Pivot's wealth of funding opportunities allows the pre-award team to find very specific matches between funding offerings and portions of programs that might have been difficult to fund in the past. “Some state-run funding opportunities have funding, but not funding that matches exactly what a program needs,” she states. “For example, we have been seeking foundation grants for one of our programs to help out in technology and travel costs, but those aren't allowed by some grants. Pivot has been helping us find new opportunities for them.

“The great thing about Pivot is that it brings us different opportunities that we wouldn't have otherwise seen or even thought about. We're doing new initiatives to expand on some of our programs. Pivot has been a huge help in seeing what the landscape is as far as grants go, what's important to funders, and what they're looking for so we can match their criteria with what our investigators are doing.”

## About Ex Libris

Ex Libris, a ProQuest company, is a leading global provider of cloud-based SaaS solutions that enable institutions and their individual users to create, manage, and share knowledge. In close collaboration with its customers and the broader community, Ex Libris develops creative solutions that increase library productivity, maximize the impact of research activities, enhance teaching and learning, and drive student mobile engagement. Ex Libris serves over 7,500 customers in 90 countries. For more information, see our [website](#) and join us on [LinkedIn](#), [YouTube](#), [Facebook](#), and [Twitter](#).