Common challenges in grant management

New regulatory requirements shift the compliance paradigm

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What’s top of mind for today’s grant management professionals?

- How can I standardize our application and post-award workflows?
- How am I doing against my objectives and performance measures?
- How can I monitor and assess risk to improve grantee and sub-recipient success?
- How do I align and optimize our resources and processes?
- How do I introduce strategic program capabilities to grow and scale our mission and reach?
- How do I leverage the full potential of my data to obtain greater insight, control, and impact?
Key differentiators

Easy, Powerful, Complete
Built by grant managers for grant managers, the GrantVantage cloud-based solution is the first of its kind to address the pre-award and post-award needs of federal, state, local governments and nonprofit organizations.

Easy implementation
Cloud-based delivery on Microsoft Azure with no required software or server installation

High capability
A comprehensive array of post-award management tools and features designed by grant managers for grant managers

Agility and scalability
Strategically extend, scale, and optimize using a full spectrum of specialized modules and services

Flexible pricing
Unlimited access to GrantVantage base and additional modules

Powerful functionality
Built to leverage Microsoft Dynamics 365, Office 365, and existing third-party financial solutions out of the box

Intuitive, easy to use tools
Insightful, actionable dashboards and tools which provide sense-making overviews and granular data insight.
GrantVantage Solution
In Dynamics 365

Federal/State Funding Received

Program/Grant Manager receives program funding

Grant Manager publishes funding announcement to portal

Applicants apply for funding in funder-branded pre-award portal

Internal and External Reviewers log in to portal and review applicants assigned to them

Grant Manager gives awards to qualifying applicants

Grant Manager reports back to Funders

Sub-Award risk/monitoring assessments, budgeting and reporting managed in post-award system

GrantVantage-Hosted Pre-Award Portal
Dynamics 365
Intelligent business applications in the cloud - AppSource

GrantVantage

Microsoft Dynamics 365
GrantVantage
Operations
Customer Service
Field Service

Office 365
Sales
Marketing
Customer Insights
Project Service Automation

Common application platform: PowerApps, Microsoft Flow, Common Data Service

Power BI
Cortana
Intelligence
Azure IoT
Integrating actors and activities

**GRANTORS & INSTITUTIONS**
- Governments
  - Federal
  - State
  - Local
- NGOs
- Non-Profits
  - Health & Human Services
  - Development
  - Relief & Outreach
  - Community/Culture

**MANAGERS & PARTNERS**
- Managers
  - Administrators
  - Community Partners
  - Legal/Accounting
  - Finance & Accounting
  - Compliance
  - Multi-Funding Groups

**RECIPIENTS & SUB-RECIPIENTS**
- Recipients
  - Agencies
  - Non-Profit Organizations
  - Grantees/Sub-Recipients
  - Contractors/Consultants
  - Project Resources

Mission, Objectives, Requirements | Program Announcements | Application Collection | Online Processing | Qualification & Needs Assessment | Panel Reviews & Selections | Award Offers | Documented Acceptance of Terms & Conditions (T&C) | Closure Assessment

Objectives Management | Activity & Performance Tracking | Budget & Accounting | Standardized Reporting | Disbursement & Reimbursement | Partner Management | Close-Out & Archiving | Carryovers | Extensions/Renewals

GrantVantage solution components

GrantVantage Overview – Base Module

- Interactive Grant Dashboards
- Grant Objective Management
- Performance Measure Reporting
- Grant Activity Management
- Partner Management
- Budget Management
- Standardized Reporting
- Integration with Microsoft Outlook
- Close-out and Archiving of Grants
- 100% Cloud-based Solution
- Correspondence Repository
- Workflow Engine
- Document Management
- Assessments
- Program & Fund Management

Microsoft Dynamics 365

Multi-Funder Projects
Sub-Recipient Management
Financial Import
Drawdowns & Reimbursements
Multi-Currency Management
Advanced Reporting
Funder Portal
Manage multi-funder programs or grant projects where there are multiple sources of funding used to deliver services or accomplish program objectives. As part of the GrantVantage budgeting process, each funder amount is allocated and tracked against expenditures and objectives. Every expense transaction is allocated to the appropriate funder and objective, thereby enabling funder specific reporting for each grant project or program.

Sub-recipient management provides an infinitely flexible hierarchy of grant or project management, enabling users to manage primary grant funds, project budgets, objectives, performance measures, activities and data at multiple levels. Share performance and financial requirements with subrecipients, contractors, program offices, divisions, departments or any other tier in your organizational hierarchy. Get a top-down view of all activity at any level using the GrantVantage interactive dashboards.

The financial Import enables users to (1) import Excel reports from your financial system, or (2) export grant related transactions from your financial system directly into GrantVantage. This module enables users to map transaction data to the GrantVantage system for posting to the appropriate grant and budget category. The Import module can also be used to push summary or detail updates of existing transactions into the GrantVantage system.

The Drawdown, Reimbursement, and Disbursement module enables complete management of all payments coming into and going out of your project, including reimbursement invoicing, scheduled drawdowns, and disbursements to sub-awardees and contractors based on actual project performance. Users can easily generate detailed transaction summaries as supporting documentation.

Advanced Reporting provides powerful and high-performance reporting on any data in the GrantVantage system. Users can build and run aggregate reports on your entire portfolio using visual charts. User have access to advanced dashboards to display financial data, revert fund, global invoice, SEFA & administrative funds. Reports include spending by revenue source, financial overview, match report, CFDA report, spending by GL code and many more.

The Funder Portal enables users to easily develop and post grant and contracting opportunities, receive and review applications and proposals, and manage review panels. This module provides funders with flexible templates, communication with applicants, reviewer recruitment and tracking, application and proposal assessment questions, and scoring. This module provides maximum flexibility to manage the entire review and award process.
GrantVantage Feature Overview

**Financial Management**
- Create Single- or Multi-Year Budgets
- Copy Budgets & Budget Templates
- Add Budget Years
- Program Income & Supplements
- Create & Import Budget Templates
- Budget Modifications & Carryovers
- Source Allocation by Funder
- Manage Funds by Program & Budget Category
- Allocate Expenses by Source & Objectives
- View & Manage Multiple Budget Versions
- Submit Budget Changes with Justification
- Budget Changes with Justification
- Track & Manage Expenditures
- Grantee & Subrecipient Invoicing
- Performance Based Payments
- Direct, Cash Match, In-kind Funds
- Planned, Obligated, Actual Transactions
- Track & Manage Inventory
- Drawdowns, Disbursements & Reimbursements
- Multi-Currency Management

**Project Management**
- Project Activities & Performance Indicators
- Extend Project Years
- Track Performance by District or Organization
- Manage Tasks & Appointments
- Create Contracts & Manage Contract Language
- Create & Perform Assessments
- Project Modifications
- Project Dashboard Views
- Notification Alerts
- Internal & External Communication Tracking
- Assign Tasks & Activities
- Project Close-out
- Project Archive

**Data Management**
- User Permissions
- SharePoint Integration
- Azure Blob Integration
- Document & Media Repository
- Manage Contacts & Organizations
- Outlook Integration
- Digital Signature Integration
- Microsoft Office 365 Integrated

**Reporting**
- Track Program & Project Budgets
- Customizable Reporting Periods
- Project Reports with Sort & Filter Options
- Portfolio Reports with Sort & Filter Options
- Microsoft Dynamics 365 Ad-Hoc Reporting
- Outlook Integration
- Digital Signature Integration
- Microsoft Office 365 Integrated

**Funder Portal**
- Create Funding Announcements
- Budget Templates
- Announcement Templates
- Email Templates
- Review Panels & Rounds
- Scoring & Award Notifications
- Reviewer Recruitment & Assessment
- Workflows
- Applicant Communication

**Subrecipient Monitoring**
- Compliance & Oversight
- Budget Management
- Invoicing
- Drawdowns, Reimbursements & Disbursements
- Performance Management & Reporting
- Internal Communication