



GRANTS MANAGEMENT SOLUTION



Common challenges in grant management

New regulatory requirements shift the compliance paradigm

Requirements

- Rigorous grant standards
- Regulatory compliance
- Performance monitoring
- Budget Transaction Auditing
- Data collection
- Document management
- Program and process optimization
- Contract management
- Evidence-based assessments
- Transparency & accountability
- Communications auditability

Challenges

- Risk assessment
- Changes and amendments
- Workflow automation
- Application processing
- Multi-jurisdictional regulation
- Reporting and notifications
- Business partner compliance
- Task and activity assignment
- Multi-level budgeting
- Evidence documentation
- Detection and resolution
- Residual funds recapture
- Data protection and consolidation



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.



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

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

Grant Manager
reports back
to Funders

GrantVantage Solution
In Dynamics 365

GrantVantage-Hosted
Pre-Award Portal



Dynamics 365

Intelligent business applications in the cloud - AppSource

GrantVantage

Microsoft Dynamics 365

 Office 365

GrantVantage



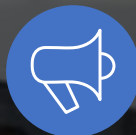
Sales



Operations



Marketing



Customer Service



Customer Insights



Field Service



Project Service Automation



 Power BI

Cortana Intelligence

Azure IoT

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



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

Standardized Reporting | Performance Metrics | Cost/Expense Documentation | Impact Assessments | Governance | T&C/Regulatory Compliance | Final Impact Assessments | Close-Outs



GrantVantage solution components



 Microsoft
Dynamics 365

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



Multi-Funder
Projects



Sub-Recipient
Management



Financial
Import



Drawdowns &
Reimbursements



Multi-Currency
Management



Advanced
Reporting



Funder
Portal



GrantVantage Module Overview



Multi-Funder
Projects

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

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.



Financial
Import

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.



Drawdowns &
Reimburse

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

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.



Funder
Portal

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

Subrecipient Monitoring

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

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

