Grants Workflow

Planning

Pull by action into the query - it's a task management tool

Funder

College Now Development

Programs

Finance

Grant 1

Grant 2

Each organization could have 1 or many grants within our fiscal year
Each grant is tracked separately with all elements below

Grant Opportunity Posted

No formal grant posted but they want us to submit something – not treated differently than a grant

Look for notices from Funder
Proactive outreach to Funder

May get notice from the Funder

List of Constituents in the System Already

Organization
- Corporations
- Foundation
- Nonprofit / Civic Organizations
- Government
  - Federal
  - State
  - Local (city)
  - Local (county)
- Trusts
- Donor advised funds

Individuals
- Person
- Trust
- Estate

Create a calendar of all the possible grants we know about year to year

Forecasting Pipeline these are OPPORTUNITIES – for the year data – this is the pipeline (pull report from Raizor's Edge)
- Manage the fiscal year – the currrent and then the next year (pipeline)
- Program Type
- This would be a possible funding source in the system even if got money from them before (not a new constituent but it is money from the same source, or could be a new constituent)
- $ amount could get
- Continually go to the "action" and then close it and make a note
- STATUS – pending, funded, proposal not submitted – (these could be notes or fields or check boxes if a proposal is not submitted= currently closed for funding, not accepting applications, don't qualify

Pull by action into the query - it's a task management tool (Grace's Query Request)

Pipeline report - can't lose any functionality – has report deadlines

Review grant opportunity (could be RFP, solicited directly)

Data attached to the GRANT OPPORTUNITY -
THE ACTUAL WE"RE GOING TO SUBMIT A PROPSAL
- Hard deadline – funders deadline
- Soft deadline – rolling deadline
- How much we are requesting per single year or multiple year
- Single year / Multiyear
- How much do we expect
- Fiscal year are we going to support
- What program will it support (the Designation assignment) - Ability to select more than one (E.g. Adults and mentoring)
- $ amount per year per program
- action types tied to specific proposal (Proposal, LOI, follow up, concept paper, look for RFP, Reports) - can have many of these per organization
- Add amount per program if there are multiple attached to the single grant request

Everything is a a funding opportunity
Then you have a grant propsal
Then you have a funded or not funded grant

Planning the grant opportunity Meeting / Discussion with departments

Meeting with development re: the Grant Opportunity

Conversation with finance Report pipeline vs. the applications "submitted"

Write first draft

Edit draft

Finalize the grant

Attach actual documents (vs links) to emails, documents, etc. to each Grant Opportunity to help provide insight into the funding opportunity request; could be emails from internal staff, funder, ideas,
Attach to directly to vs. saving as a file and attaching it

Finance make some "pending note" on their books

Submit the grant
- Date submitted grant
- Edit the final expected amount if necessary
- Edit the program (one or many if needed)

Review grant submission

Decide to fund college now

Enter the next year OPPORTUNITY for this same grant

No

Not Funded

Yes

Funded
- Actual funded amount
- Difference in amount request and amount we got (calculated)
- Any directions (e.g. marketing needs, etc.)
- Ability to add notes to any fields – changes to the amounts, etc. – Different outcomes

? How does it attach to the donation record and match

? Purple budgeting process?
How do the manager manage the grants

Finance make some "pending note" on their books

Thank you funding immed

Less formal for fundin immed

Match to th acknowled on do managen Match w donor recei the money in) Thank funding Acknowled the gifts

Phase

Thank you for not funding us - immediate

Less formal – thanks for funding us - immediate

Match to the Formal acknowledgement on donor management – Match with the donor receipt (when the money comes in) Thank you for funding us – Acknowledge when the gifts come

Make sure the grant agreement has been signed and submitted

- Received the grant agreement (yes/no, NA)
- College Now signed the agreement (yes/no)
- Date College Now signed aggrement
- Date submitted to funder
- Track the reporting deadlines – could be 1 or many, could be 1 year or many years. Need to document them all
- Check if development sends the report or programs sends the reports
- Check again to make sure that all / any changes are updated before the NGIF process

Enter in report deadlines

- For federal reporting – does program enter the reporting deadlines?

NGIF Process – Fill out the form to let finance know – we want to automate this process

GRACE is the only person that fills our the NGIF form – and then it gets sent to everyone. IDEALLY if we capture in Salesforce, then don't need the NGIF form – but have all that information sent to everyone
Need to attach all the Documents that are sent – will it get sent through Salesforce? Links to the PDF document

System to generate this form / email Send finance (Program Managers, Finance) summary of award – what it's for, timeline, amount, single/ multiyear, marketing requirements, unallowable expenses

Tell marketing to send out some marketing press release

Enter the program report deadlines for programs (each group may do something different)

Finance does something? Is there an autopopulate with NGIF??

Development sent the report

Create reports Send to Development

Federal report – create and send to Federal (Development doesn't do)

New Grant Information Form

Hi, Kauser. When you submit this form, the owner will see your name and email address.

Required

1.Grant Name

Enter your answer

2.Funder

Enter your answer

3.Is this a federal or nonfederal grant?

Federal

Nonfederal

4.Grant Number

Enter your answer

5.Grant Term (i.e. 8/1/22-7/31/27)

Enter your answer

6.Total Amount of Award

Enter your answer

7.Is the total amount of the award more or less than the amount forecasted?

Enter your answer

8.Amount of Award Per Year

Enter your answer

9.How many positions, if any, does this grant fund?

Enter your answer

10.Report Dates (if applicable)

Enter your answer

11.Key Grant Requirements

Enter your answer

12.Special Marketing Requirements (if applicable)

Enter your answer

13.Select all funding exclusions from the list below:

Enter your answer
13.Select all funding exclusions from the list below:

Standard 21stCCLC exclusions

Standard DOE exclusions

Alcohol

Food

Indirects

Salaries

None

Other
14.Is this funding restricted? If so, please describe the restrictions and amounts.
Enter your answer
15.Upload grant award notification (GAN, email notice, etc.).
(Non-anonymous question
)

Upload file
File number limit: 1
Single file size limit: 10MB
Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio
16.Do you have any other documents to upload that are pertinent to this grant award (i.e. budgets documents, required report templates, grant requirements, etc.)? If there is a budget variance, be sure to select "yes" and upload spending budget.

Yes

No
17.Upload any additional documentation pertinent to this grant, including spending budget that has been reviewed with program staff if applicable.
(Non-anonymous question
)

Upload file
File number limit: 5
Single file size limit: 10MB
Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio
18.Is there anything additional that is critical to be aware of as we begin grant implementation?
Enter your answer
19.Select who should be notified of this new grant.
*Michele Scott-Taylor, Kittie Warshawsky, Alenka Winslett, Mark Magyar, Brandon Roberto, Marley Wilder, Joe Faulhaber, Alison Bibb-Carson, Jon Marshall, Steph Bunsey, Grace Hermanns, Bailey Capelle, Cynthia Boncella, Chris Riddle, Bob Durham, Kate Schwab, and Maggie McGrath are automatically notified of all new grants.

If no one additional needs to be notified, please select the "accounting@collegenowgc.org" option below.

accounting@collegenowgc.org

agrafmeyer@collegenowgc.org

arice@collegenowgc.org

agrammeyer@collegenowgc.org

arice@collegenowgc.org

barendas@collegenowgc.org

bcapelle@collegenowgc.org

bmcfadden@collegenowgc.org

dhawkins@collegenowgc.org

djarvis@collegenowgc.org

hbeasley@collegenowgc.org

krazvi@collegenowgc.org

lseymour@collegenowgc.org

mprice@collegenowgc.org

mrife@collegenowgc.org

nprice@collegenowgc.org

pwallace@collegenowgc.org

sgriffin@collegenowgc.org

vcourtney@collegenowgc.org

Other
Submit