[CLIENT NAME]

{g} grants Solution Design

Version 4.0

Good Done Great Professional Services

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Revision History

Version	Date	Change Description	Revision Owner

Acceptance

Good Done Great and [CLIENT NAME] are in agreement that the requirements documented below are accurate and representative of the partner's business needs. This document will act as the basis for all subsequent implementation activities.

Acceptance of proposed solution design and initial tenant instance constitutes acceptance of solution design, and any further changes in scope are subject to change control process.

	[CLIENT NAME]		**Good Done Great**
By:	______________________	By:	______________________
Name:	______________________	Name:	______________________
Title:	______________________	Title:	______________________
Date:	______________________	Date:	______________________

Contents

1 Overview

1.1 Grants Management System

The Good Done Great solution will offer grant administrators a SaaS grants management system. Applicants will be able to log into a web portal to enter in their personal and organizational information and apply for grants offered by [CLIENT NAME]. If the applicant is granted, they will also be able to access their payment information and enter progress reports in this portal. A second portal will be configured that will allow reviewers for [CLIENT NAME] to review and make recommendations for requests.

The back office of the Good Done Great system will allow grant administrators to manage the grants process by viewing requests, assigning requests to reviewers, approving or denying requests, scheduling payments on awarded requests, and creating reports on data entered into the system.

2 Requirements

2.1 Definitions of Commonly Used Terms

Relational Database – a system in which data is organized such that related data is grouped together as objects which are then related to other objects. For a more detailed explanation, please see http://en.wikipedia.org/wiki/Relational_database

Applicant(s) – the person(s) applying on behalf of an organization or themselves in the applicant portal.

Grant Administrator(s) – the person(s) representing [CLIENT NAME] who will be in charge of using the Good Done Great back office

Back Office – the user interface for administrators of the Good Done Great solution

Reviewer(s) – the person(s) responsible for reviewing grants requests and making recommendations on funding. May or may not be members of [CLIENT NAME]

Review Committee – a group of reviewers who will be reviewing the same request(s)

Applicant Portal – the interface for applicants to the Good Done Great solution. Applicants use the portal to create and view their organizations, requests, and progress reports and view their payment information.

Fund – A source of money for one or many Grant Programs or Grant Cycles

Fund Allocation – A specific amount of money allotted from a Fund to a particular Grant Program or Grant Cycle

Grant Program – a grant offered by [CLIENT NAME], typically on a recurring basis

Grant Cycle – a particular iteration of a Grant Program offered by [CLIENT NAME]

Eligibility question –question(s) asked before an Applicant begins a Request to determine if they meet the basic requirements necessary to be eligible for a particular grant. Applicants must answer “Yes” to these questions in order to be able to create a Request.

Conflict of Interest – questions designed to determine if a Reviewer may have any connection to a particular applicant or organization which may cause the appearance of impropriety in their review

Due diligence – a set of actions taken by grants administrators to ensure that grantees are eligible non-profits

OFAC SDN – the US Department of the Treasury Office of Foreign Assets Control publishes the Specially Designated Nationals list which contains individuals, groups, and entities which US persons are prohibited from dealing with

2.2 Use Cases, Applicant, Reviewer, and Grant Administrator Workflow

The following sections describe the applicant experience through the application process of {g} grants as well as the grant administrator’s experience through the back office of {g} grants.

2.2.1 Grant Program and Grant Cycle Setup

Good Done Great will set up the initial grant program(s) and the initial grant cycles for [CLIENT NAME].

Grant programs may have eligibility questions to help prevent undesirable requests from entering {g} grants. To edit, create, or delete these questions;

navigate to the Setup tab in the back office and select Edit in the Actions column for the grant program. On the grant cycle page, select the Eligibility tab. To add a new eligibility question, select the Add Eligibility Question button. This will create a new blank question. Fill in the Question Text field to add a question. To delete a question, click the delete link next to the question. Questions will appear on the portal in the order listed here. Once these modification are complete, select the Save button.

Grant programs contain the eligibility, request, review, conflict of interest, and progress report questions. These fields will be set up initially by Good Done Great, but can be modified by the grants administrator after the project is completed.

To give the applicants more information about the request process, each Grant Program has a Preview option on the portal. This preview is a PDF upload which is to be provided by the grants administrator to Good Done Great.

Budget requirements for grants programs vary widely across different organizations and so to support that, {g} grants offers the following options with the **Applicant Budget Information Taken** setting, which has the following five options.

Option	Meaning
By Request – As Form	Budget information is not asked for in the application. Instead, there is an action in the back office to email an applicant and ask them to submit budget info in a form on the portal.
By Request – As Upload	Budget information is not asked for in the application. Instead, there is an action in the back office to email an applicant and ask them to submit budget info as a file upload on the portal.
During Application Process – As Form	Budget information is asked for during the application as a form.
During Application Process – As Upload	Budget information is asked for during the application as a file upload.

Never	The applicant is never asked for budget information and there are no actions in the back office to request this.

{g} grants supports grants to organizations and individuals. On the Grant Program edit page, using the field **For Individuals, Capture Organization** you have the following three options:

Option	Meaning
Yes	This grant program grants to individuals, but we also will allow them to be associated with an organization.
No	This grant program grants to individuals and we do not want to track any organizational affiliation.
We Do Not Award Individuals	This grant program grants to organizations exclusively.

{g} grants also supports invitation only grants programs. To set up a grant program as invitation only; check the **Invitation Only?** checkbox and input a code into the **Activation Code** field. If this is set up, any applicant would have to enter this code into {g} grants before starting their request.

Grant cycles are derivative of a single Grant Program. Grant cycles have open and close dates and times. The grant cycle will be available on the applicant portal starting at the open date and time and will automatically close at the close date and time. Any requests which are still in Draft status at the close date and time will be marked as Incomplete and removed from the standard views. This will not prevent grants administrator(s) from moving the request along through the review process – the close date will only stop applicants from starting new requests or submitting an open request for this cycle.

Grant cycles can be set to Upcoming, Open, or Closed. Only one grant cycle per grant program can be set to Open at any given time.

2.2.2 Fund and Fund Allocation Setup

To create a fund, go to the Setup tab and select Funds. From there, select New Fund. This brings up the New Fund page, with fields for the Fund Name, Fund Budget, and Fund Description.

Once your funds are created, to allocate funds to a particular Grant Program, go back to Setup and choose the Grant Program. From there, scroll to the bottom and choose New Fund Allocation. From here, you can choose the Fund, the Cycle, and set the amount of funds allocated to that particular cycle of the Grant Program.

2.2.3 Applicant Portal Sign Up/Login

Applicants will access Good Done Great by clicking an https link, which can be embedded in the [CLIENT NAME] website. This will bring the applicants to the Homepage of the applicant portal, which will be customized with the [CLIENT NAME] logo and additional text provided by [CLIENT NAME]. At this point the applicant is prompted to sign up for a new account or to log in with an existing account. Signing up for a new account prompts the applicant to provide an email address (which is also used as their unique login name), a password, and register their profile on the site. After signing up, the applicant is brought to a page thanking them for signing up. They will also receive an activation email that prompts them to confirm their email address before logging in for the first time. Once they log in, they are brought to the Dashboard, which prompts the applicant to continue as well as giving some tips about how the experience of {g} grants works and also shows other communications from grant administrators to applicants. This page can be customized per [CLIENT NAME]. To start the application, the applicant will click on My Open Applications in the left-hand navigation pane or on Continue.

2.2.4 Application Creation and Submission

Once the applicant clicks on the My Open Applications link, they are brought to the Your Applications page. At this stage they are prompted to begin a new application. This link brings the applicant to the New Request page where they are prompted to select an open grant cycle. If the grant cycle has eligibility questions, those will appear. The applicant must answer “Yes” to each of these eligibility questions in order to be able to proceed. If the grant does not have eligibility questions, they can proceed once a grant is chosen by clicking the button labeled Save and Continue.

There is a slight divergence in steps here depending on the type of Grant Program. If the Grant Program is set to **For Individuals, Capture Organization = No**, then this step is bypassed and the applicant is taken forward to the Project Overview page of the Request.

If the Grant Program is set to **For Individuals, Capture Organization = Yes or We Do Not Award Individuals,** then the applicant is brought to Step 2 – Choose an Organization. Then applicants can choose to either select an organization already entered into [CLIENT NAME]'s {g} grants implementation or create their own if their organization is not currently in the implementation.

If the Grant Program is set to **For Individuals, Capture Organization = Yes**, then there are two options for the applicant. **I am not affiliated with an Organization** and **Applicant is Payee?** . If the applicant selects the first option, the second option is automatically checked as they would be the only person available to be the payee and they can proceed without inputting any organization information. If they do not select this, they will be required to attach an organization to their request in order to be able to submit. If the **Applicant is Payee?** option is selected, should they be awarded the payment and due diligence information will be tied to their Applicant information.

If the applicant chooses Add New Organization, they are brought to the Organization | New page. This page will require the name, EIN, and type of the new organization and allow the applicant to enter in other identifying information about the organization (address, contacts, logo, etc). Saving this will return the applicant to Step 2 where they can continue on with their newly created organization selected.

This will bring the applicant to the Project Overview tab of the request, which will require a Project Title, Amount Requested, and Request Summary (and allow the applicant to enter beginning and end dates for the project but not require them.)

The next page is the Additional Info page which shows the custom questions for [CLIENT NAME].

The next page is the Documentation page, which allows applicants to upload any number of files to their request. Applicants are asked to provide a description of the file and the source, but these fields are not required.

The next page is budget, which allows applicants to add any number of line items for their request's incomes and expenses. Again, the applicants are asked to provide a description and source of each line item.

The next to last page is the Final Review. This page displays all of the information added to the request by the applicant and is formatted for printing. If all of the required information has been entered, the applicant is prompted to proceed to the Submit page.

On the Submit page, the applicant is asked to confirm their information is correct and provide their digital signature. The language on this page can be customized to meet the legal needs of [CLIENT NAME]. Once the request is submitted, the applicant will be brought to a page thanking them for submitting their application and receive a notification email with text customized by [CLIENT NAME]. The applicant can then view their application on the My Submitted Applications page on the left, but they can no longer make edits to the application.

2.2.5 Reviewer and Review Committee Creation

In the back office, once a request is submitted it is now available to be reviewed. Unlike Applicants, Reviewers are typically created by the grant administrator in the back office.

To create a reviewer from the back office, navigate to the Community tab and scroll down to the Reviewers section and click the New Reviewer button. Here you must set a login email and password and may set their name and contact information. Click save on this page to finish creating a reviewer.

To create a Review Committee, click the Review Committees link under the Community tab and select New Review Committee. Here you can set the name of the committee and attach any reviewers that have been created to the new committee.

Once all of the reviewers and committees have been created, we can now assign individual reviewers or committees to submitted requests. There are two ways to assign these. The first way is to navigate to the Requests tab and scroll down to the request you're ready to start reviewing, under the Workflow Actions column there will be either Assign Reviewers or Assign Committee. Clicking this will bring you to either the Assign Reviewers or Assign Committees page respectively. Once there, use the magnifying glass icon or begin typing the name of the reviewer or committee and you can select which reviewers or committees to assign to this request. Adding reviewers or committees to a request will change the status of the request to In Review and allow reviewers to access the request on the reviewer portal.

2.2.6 Reviewer Portal Sign In and Review

Signing into the reviewer portal is similar to the applicant portal, except that in most cases the reviewers will have their accounts created for them. Once logged in, the reviewer will be brought to the Reviewer dashboard where they can see a list of requests that are available to be reviewed. Only the requests assigned to a particular reviewer or committee will be visible. Clicking on the title of the request will bring the reviewer to the overview of the request formatted the same way as the View Request page in the applicant portal. To start a review, click the Start Review button at the top right. This will bring the reviewer to the Edit Review page which will list the review questions configured for that grant cycle. Submitting the review will change the review's status to Completed.

The review process is different in every organization and can be customized to include scoring and multiple rounds of reviewing.

2.2.7 Decisions and Payments

Once the review process is completed, each request will need to be awarded or declined. This process is available once a request has at least one completed review. This action is available in the back office on either the requests page in the action column (Decide) or on the request overview page (Make Decision). These will take the grants administrator to the New Decision page where they can select if the decision is Awarded, Declined, On Hold, or In Review, the amount of the award if it is Awarded, and the start and end dates of the award.

If the Decision is marked as Declined, this is the end of the workflow for that request.

If the Decision is marked as Awarded, the applicant will receive a notification email that their request has been awarded and the My Awards menu will appear on the left hand navigation on the portal. The My Awards page will list all Awards that have been given to that applicant and will provide an action for the applicant to Accept Award. On the Accept Award page, the applicant is provided with the title of the request, the grant program, the amount requested, the amount awarded, and the start date of the award.

If **Applicant is Payee? = True** (only available on grants to individuals), then Applicants are required to verify the name of the payee (any applicant attached to the request is an option) and SSN of the payee.

If **Applicant is Payee? = False**, then the Applicant is shown the EIN already provided for their organization and asked to verify it before they can accept the award.

Once a Decision is Awarded and Accepted, the grants administrator will have an available Action to Create Payment. Creating a payment will required the grants administrator to enter a payment amount and payment date, and allow a fulfillment date and progress report due date. The status of the payment can be set to Scheduled, Pending, or Fulfilled. Once a payment is created, the applicant will receive a notification email and the payment will be visible on the My Payments page in the applicant portal. The applicant will also receive a notification email when a payment's status is changed to Fulfilled.

2.2.8 Progress Reports

If a grant cycle has a progress report associated with it, the Payment | View page in the applicant portal will have a button labeled Start Report. The default behavior of {g} grants is to require a progress report for every payment for those grant cycles that have progress reports. Clicking the Start Report button will bring the applicant to the Edit Report page. This page, like the Edit Review page in the reviewer portal, will display the progress report questions configured for this grant cycle. The applicant can also access their previously submitted request related to this payment by clicking the View Request link. Submitting the progress report will change its status from Draft to Submitted.

2.2.9 Due Diligence

{g} grants offers several ways to help grants administrators perform due diligence on their grantee organizations.

From the organization overview in the GDG back office, {g} grants provides links to the organization's Guidestar, ProPublica, National Center for Charitable Statistics, and grantr profiles.

To create a new Due Diligence, start by clicking the Update Verification button. This queries the grantr database and creates a new, time-stamped record which is added to the organization's profile so that there is a clear history of the organization's due diligence. To access this record, scroll down to the Due Diligence section on the organization profile and click on the top most record. This will bring you to the Due Diligence overview. From here you can see automatically if this organization is a verified non-profit, their current IRS status, and if the organization or any of the organization's contacts appear on the OFAC SDN list.

You can also create a new organizational report by clicking the Update Grantr PDF button. This generates a new document with the organization's non- profit information as it appears in the IRS database and attaches it to the Due Diligence record.

3 Database Architecture

{g} grants is configured as a web portal supported by a relational database.

3.1 Objects and Relationships

This chart shows the relationships of most of the objects that comprise {g} grants. This chart reads from left to right as _____ has ____ _____ . For example, in line 3 Request has many Reviews.

	Applicant	Organization	Request	Review	Reviewer	Review Committee	Decision	Payment	Progress Report	Due Diligence
Applicant		Many	Many				Many	Many	Many	
Organization	Many		Many	Many			Many	Many	Many	Many
Request	Many	One		Many	Many	One	One			
Review		One	One		One	One				
Reviewer			Many	Many		Many				
Review Committee			Many		Many					
Decision	One	One	One					Many		
Payment	One	One					One			One
Progress Report	One	One						One		
Due Diligence		One						One		

4 Technical Design and Configuration

Configuration of the Good Done Great solution covers the following areas:

4.1 Email Configuration

{g} grants will be customized to send emails to match [CLIENT NAME]'s structure in the following ways.

4.1.1 DKIM and SPF

DKIM is a DNS-based email authentication mechanism that helps GDG more effectively send mail on your behalf by allowing receivers to verify that we have permission to send your email. To enable DKIM, create a TXT record for Mandrill._domainkey.yourdomain.com(just replace yourdomain.com with the domain you're setting up) with the following value:

k=rsa;
p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCrLHiExVd55zd/IQ/J/mRwSRMAocV/hMB3jXwaHH36d9NaVynQFYV8NaWi69c1veUtRzGt7yAioXqLj7Z4TeEUoOLgrKsn8YnckGs9i3B3tVFB+Ch/4mPhXWiNfNdynHWBcPcbJ8kjEQ2U8y78dHZj1YeRXXVvWob2OaKynO8/lQIDAQAB;

Some DNS providers require that semicolons be escaped. If your provider requires escaping, use this value instead:

k=rsa\;
p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCrLHiExVd55zd/IQ/J/mRwSRMAocV/hMB3jXwaHH36d9NaVynQFYV8NaWi69c1veUtRzGt7yAioXqLj7Z4TeEUoOLgrKsn8YnckGs9i3B3tVFB+Ch/4mPhXWiNfNdynHWBcPcbJ8kjEQ2U8y78dHZj1YeRXXVvWob2OaKynO8/lQIDAQAB\;

SPF is another DNS-based email authentication mechanism. If you don't yet have an SPF record, you'll want to add one for your domain. At a minimum, the value should be the following if you're only sending mail through Good Done Great for that domain:

v=spf1 include:spf.mandrillapp.com ?all

If you already have a TXT record with SPF information, you'll need to add Good Done Great's servers to that record by adding include:spf.mandrillapp.com in the record (before the last operator, which is usually ?all, ~all, or -all).

4.1.2 Default Sender

By default, all email sent from Good Done Great will be sent from no-reply@gdg.do. During the implementation process, please decide on a generic [CLIENT NAME] address to use as the default sender. Once an email address is added, the client administrator will receive an email from Amazon Web Services to confirm that we may send email from this address. Only one email address can be set as the default sender per customer zone.

4.1.3 Notifications

{g} grants includes email notifications to help automate certain aspects of the communications process to applicants. These notifications may be turned off by Good Done Great during implementation if deemed necessary by the grants administrator(s). These notifications are as follows:

Colleague Welcome
Colleague Added to Request
LOI Received
LOI Approved
LOI Declined
Request Received Confirmation
Reviewer Added to Request
Grant Cycle Closing
Request Awarded
Request Declined
Request On Hold
Payment Fulfilled
Payment Scheduled

4.2 Supported Browsers

Good Done Great currently supports the following web browsers. Users who visit the {g} grants portal using a browser that does not meet these requirements will be greeted with an error message and asked to upgrade their browser.

Mozilla Firefox version 21 and greater
Google Chrome version 27 and greater
Apple Safari version 6 and greater
Opera version 13 and greater
Internet Explorer version 9 and greater

4.3 Single Sign-On

Good Done Great portals can be SAML 2.0-enabled and integrated with existing SAML 2.0 Identity Providers. [CLIENT NAME] will provide Good Done Great with the following information:

-IDP Metadata file for staging environment (URL or XML document)

-IDP Metadata file for production environment (URL or XML document)

- SAML Assertion-generating URLS

- Any Attributes to be included in the SAML assertion (sample table below)

SAML Name (proposed)	Required?	Format
nameid	Y	Generally Employee email is used for unique reference.
location		
firstname		
lastname		

- If [CLIENT NAME] requires multiple Good Done Great portals to be SSO-enabled, then an additional attribute with the name of "portalid" will be provided as a unique identifier for each portal.

Good Done Great will provide [CLIENT NAME] with the following information:

Staging Environment Information

SAML Entity ID	
ACS URL	
RelayState URL	
Supported Attributes	

Production Environment Information

SAML Entity ID	
ACS URL	
Relay State URL	
Supported attributes	

4.4 CSS (Cascading Style Sheets)

CSS drives the look and feel of the portals for applicants and reviewers. Good Done Great can create custom CSS to match the [CLIENT NAME] brand. More information on this will be provided if [CLIENT NAME] chooses to have this created.

4.5 Media Account Management

Good Done Great boasts an integration with Flickr, Soundcloud, and Vimeo to provide management of grants that require high quality images, audio, and video. More information on this will be available in Q2 2014.

Appendix A: Database Model

Database Model