

GrantVantage[®]

GRANTS MANAGEMENT SOLUTION

04-08-2022



Welcome to
Levy County *Florida*

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 Modules



Multi-Funder
Projects

Manage multiple sources of revenue within a grant program or within grant projects. As an add-on to the standard GrantVantage budgeting process, users can track additional sources of funding such as, supplements, carryovers, and reverts, partner contributions or additional grant awards or appropriations. Amounts are allocated and tracked against Funds, Program Funds, expenditures and or objectives. Every expense transaction is allocated to the appropriate funding source, funder and or objective to enable specific reporting for grant projects or programs.



Subproject
Management

The subproject or subrecipient management module provides a 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 activities, KPI's, and financials at any level using the GrantVantage interactive dashboards.



Financial
Import

The Financial Import module enables grant and subrecipient users to import expenses from excel or other financial systems directly into GrantVantage. This Add-on module enables users to map transaction data to the GrantVantage system for posting to the appropriate budget and budget category. The Financial Import module can also be used by grantees and subrecipients to push summary updates of existing transactions into the GrantVantage system. Specialized training for mapping and importing expenses is required to support grantees and subrecipients and is not included in the standard implementation process.



Drawdowns &
Reimburse

The Drawdown, Reimbursement, and Disbursement Add-on module enables complete management of all payments coming into and going out of grant and subrecipient projects, including reimbursement invoicing, scheduled drawdowns, and disbursements to grantees, subrecipients, and contractors based on actual project performance. Users can easily generate detailed transaction summaries as supporting documentation. This module is normally used in conjunction with the Financial Import module for grantees and subrecipient reimbursement invoicing with related support documentation.



Advanced
Reporting

Provides powerful and high-performance reporting on any data-field in the GrantVantage system. Users have access to project and portfolio reports, plus the Microsoft Report Wizard. Build and run anytime of aggregate report, export reports to excel, and use with Power BI for unique visual charts and data analysis. User have access to advanced dashboards to display financial data and program data, a global look at all submitted invoices, spending by revenue source to see fund or project burn rates, complete financial overviews, match reports, CFDA, and portfolio views of spending by GL code or budget category. This module is excellent for grantee and subrecipient compliance overviews.

GrantVantage Features

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 access and Project Permissions
- Document & Media Repository
- Contacts & Organizations
- Outlook Integration
- Digital Signature Integration
- Microsoft Office 365 Integrated
- Azure Blob

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
- Performance Management & Reporting
- Invoicing
- Drawdowns, Reimbursements & Disbursements
- Monitoring assessments
- Internal Communication

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
- Power BI Ready

GrantVantage Offering – Levy County BCC

User Access - \$25,000 USD

Out of the Box: 25 Internal Users, Multi-Funder/Source Allocation, Drawdowns - Reimbursements & Disbursements, Financial Transaction Import, Sub-Project Management, Advanced Reporting, and the Funder Portal.

*Maintenance, Updates, Live Support and a 24/7 Help Desk with ticketing system are included.

Implementation - \$10,000 USD (Year 1)

As a Customer of GrantVantage you will be assigned a dedicated onboarding Team Leader who will serve as your main point of contact to facilitate and coordinate the onboarding and Go-Live process. The Team Leader will ensure the success of your implementation and coordinate all related source documentation and templates are uploaded. Implementation requires coordination and close communication between the GrantVantage onboarding team and your lead staff. Materials and training resources will be provided to teach users how to navigate the GrantVantage system, perform grant administrative tasks, build and manage grant projects and budgets, and quickly become familiar with GrantVantage interface. Implementation services include the following:

- 18 hours of onsite training/technical support
- 4 Hours of strategic planning
- 40 Hours of technical support
- Configure a complete end to end grant
- Set up organizational programs, funds & program funds
- Outlook configuration
- Financial expense import mapping
- Configure users and permissions
- Live technical support for 1 year
- Weekly implementation meetings

Assumptions

Client is responsible for the procurement and management of Microsoft Dynamics 365 licenses.