Grants Management Guide

11/14/2014 Blackbaud CRM 4.0 Grants Management US

©2014 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

GrantsMgmt-2014

Contents

FOUNDATIONS: THE BIG PICTURE 1

Full Circle View **1**

1. Grantors 2
2. Funding Plans and Funding Requests 2
3. Manage Funding Requests 2

GRANTORS AND GRANT PROGRAMS 5

Grantors **5**

- Add Grantors 5
- Add Grant Programs 6

Grant Program Record **6**

- Grant Program Details 7
  - Funding Types 7
  - Deadlines 7
- Awards and Requests 8
- Attributes Tab 8
  - Add Attributes 8

FUNDING PLAN 11

Funding Plan Record **11**

Funding Plan Page **12**

- Funding Requests Tab 12
- Documentation 13
  - Notes 13
    - Add Notes 13
  - Media Links 13
    - Add Media Links 13
  - Attachments 13
    - Add Attachments 13
  - Open Attachment Files 14

Funding Requests Overview **14**

- Add Funding Requests 14

Funding Requests Page **17**

- Steps Tab 17
  - Add Documentation to a Step 18
  - Edit All Steps 18
  - Add Steps 18
  - Mark Steps Complete 20

        Manage Step Responses 20
    Grant Awards Tab 20
    Designations Tab 20
    Secondary Solicitors Tab 20
    Documentation Tab 20
    Attributes Tab 21
    Funding Request History 21
Grant Awards **22**
    Add Grant Awards 22
Grant Award Page **23**
View Grant Activity **24**

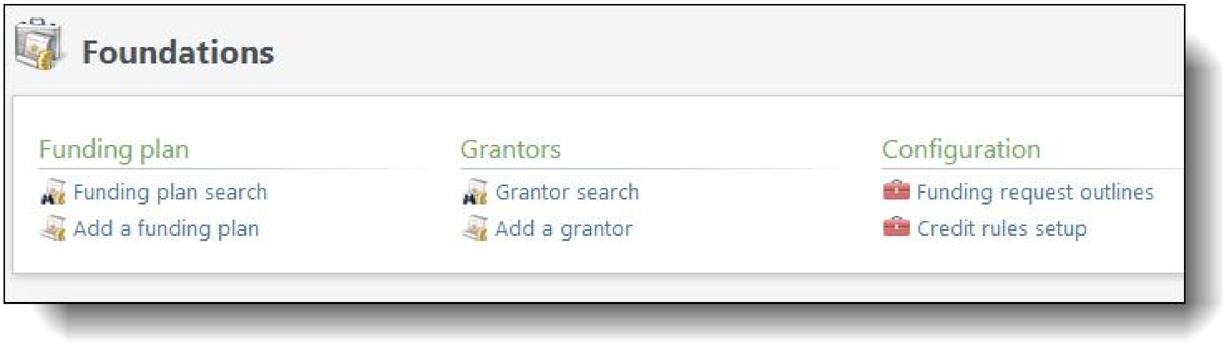
GRANTS CONFIGURATION 25

Funding Request Outlines **25**
Solicitor Revenue Credit **26**
Consolidate Grants and Major Giving **27**

Foundations: The Big Picture

Full Circle View **1**

In *Foundations*, you can create records for organizations that fund grant programs and enter the grant programs your organization identifies as potential funding sources.



When you identify a need for funding, you can create a funding plan that identifies an overall funding goal and enter each funding request your organization wants to pursue to meet this goal. For example, a university identifies a need for one million dollars in funding to support an Online Community Learning program. While fundraising efforts account for a portion of the required funding, you need to identify grant programs to cover half of the total cost. You can create a funding plan for Online Community Learning, then identify specific programs that require funds so you can refine your search for applicable grant programs.

The next step is to create a funding request for each grant program with funding interests that match your funding needs. For example, if you create a funding plan to support medical research, you can link each funding request in the plan to a grant program that specifically supports this type of research. The funding request defines the details of the request and the steps required to complete the process. When you receive notification of a grant award, you can enter this information and apply revenue from each grant award payment to the corresponding grant award.

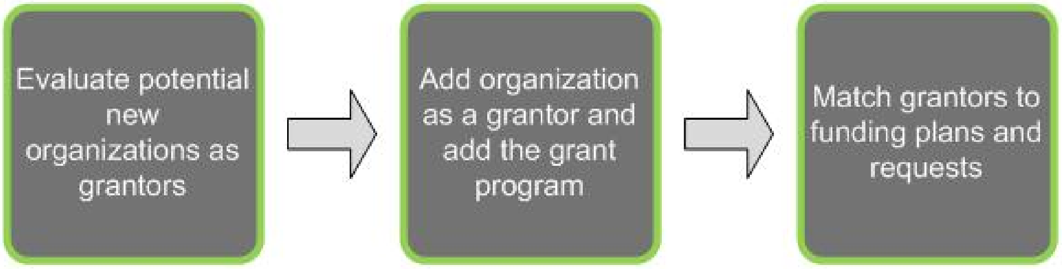
Note: Before you manage information about grants and grant requests, use configuration options to set up *Foundations* for your users. For example, you can define plan outlines and the default credit rules you want to make available. For information about *Foundations* configuration options for grants, refer to Grants Configuration on page 25.

Full Circle View

Regardless of the grant programs and funding plans you create, the grants management process includes similar steps. Use the following list to review descriptions for each step and how they relate to each other.

1. Grantors

You and your staff review and identify new organizations to add as constituent "grantors" in the database. You associate these grantors with grant programs. Next, you begin to research and match grantors with funding plans and funding requests.

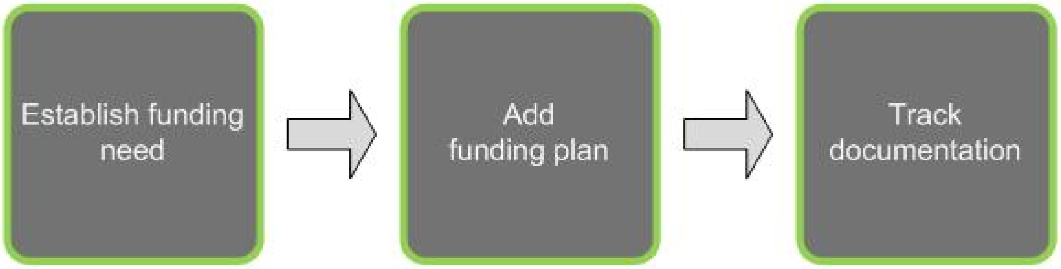

Evaluate potential new organizations as grantors
Add organization as a grantor and add the grant program
Match grantors to funding plans and requests

For more information, refer to the following sections.

- Grantors on page 5
- Grant Program Record on page 6

2. Funding Plans and Funding Requests

After you add grantors, you configure a Funding Plan Outline for your staff to execute funding plan activities. Accurately tracking this progress is important to the overall success of the grant management and to fundraising reports.

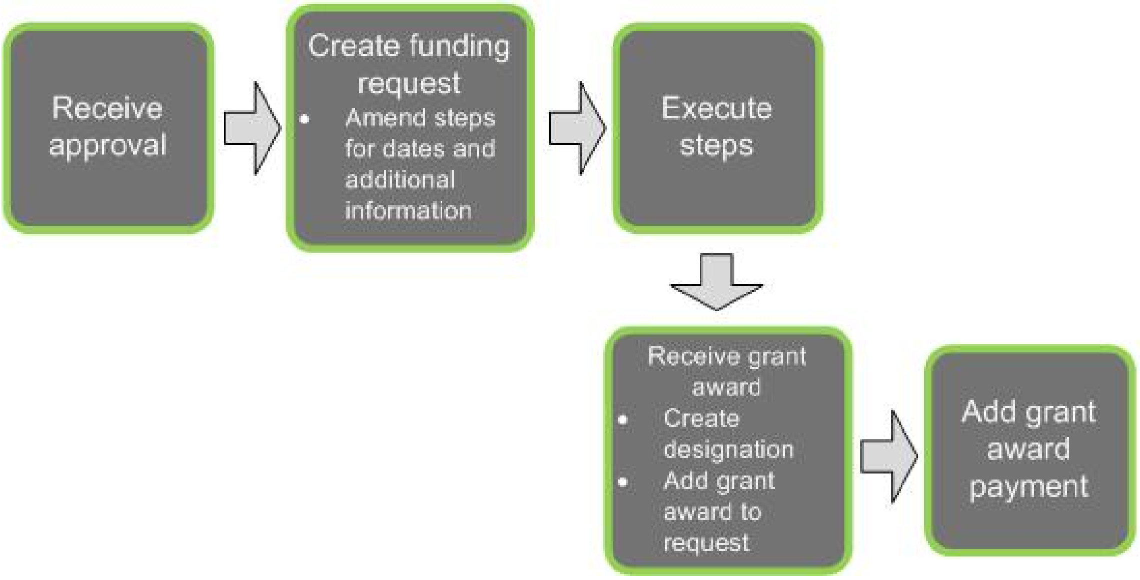

Establish funding need
Add funding plan
Track documentation

For more information, refer to the following sections.

- Funding Request Outlines on page 25
- Funding Plan on page 11
- Documentation on page 13

3. Manage Funding Requests

To track grant management activities, add at least one funding request to a funding plan. The funding request contains the steps, default designations, grant awards, and documentation related to the grant.


Receive approval
Create funding request
• Amend steps for dates and additional information
Execute steps
Receive grant award
• Create designation
• Add grant award to request
Add grant award payment

For more information, refer to the following sections.

- Funding Requests Overview on page 14
- Add a funding request - Steps tab on page 15
- Grant Awards on page 22
- Grant Award Page on page 23

Grantors and Grant Programs

Grantors **5**

Grant Program Record **6**

From *Foundations*, you match your organization's funding needs with active grant programs, track grant program deadlines and award information, and report on grant program activity.

> ***Note:*** Before you manage information about grants and grant requests, use configuration options to set up *Foundations* for your users. For example, you can define plan outlines and the default credit rules you want to make available. For information about *Foundations* configuration options for grants, refer to Grants Configuration on page 25.

Grantors

A grantor is the organization that funds a grant program. To make an organization a grantor, you assign a Grantor constituency to the organization from **Add a grantor** on the Foundations page. To access the Grantor view of an organization, click **Grantor** under **View as** on the organization's constituent record. Although you can view the Grantor constituency from the Constituencies tab of the organization's constituent record, you cannot delete the constituency from this tab. You also cannot add the Grantor constituency to an organization from the constituent record. To manage grantors, you must access the grantor record from *Foundations*.

Add Grantors

To add a grantor, you assign a Grantor constituency to an organization record. Once you create a grantor, you can add the grant programs that the grantor funds.

▸ **Add a grantor**

1. On the Foundations page, click **Add a grantor**. The Add a grantor screen appears.
2. In the **Constituent** field, search for and select the organization to make a grantor.

   If the organization is not a constituent in your database, click **Add** on the search screen to create a constituent record for the organization.
3. In the **Type** field, select the type of grantor such as Foundation or Trust.
4. In the **Contact** field, select a contact for this organization. Only individuals marked as contacts on the

Relationships tab of the organization’s constituent record appear.

5. Click **Save**. The Grantor page appears.

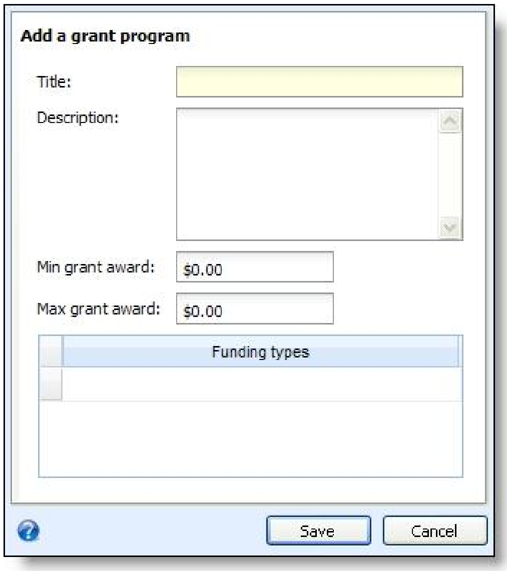
Add Grant Programs

From the grantor record, you can add the grant programs the grantor issues. When you add a grant program, you can enter its eligibility requirements, minimum and maximum award amounts, and the type of programs or projects it funds.

For information about how to manage grant programs, see Grant Program Record on page 6.

Add a grant program

1. From a grantor record, under **Grant programs**, click **Add** on the action bar. The Add a grant program screen appears.



2. In the **Title** field, enter the name of the program.
3. In the **Description** field, enter additional information to help identify the program.
4. In the **Min grant award** and **Max grant award** fields, enter the minimum and maximum award amounts you can receive from the program.
5. Under **Funding types**, select the funding interests associated with the program. For example, if a grantor awards the program to only projects that conduct medical research, select Medical and Research.
6. Click **Save**. You return to the grantor record.

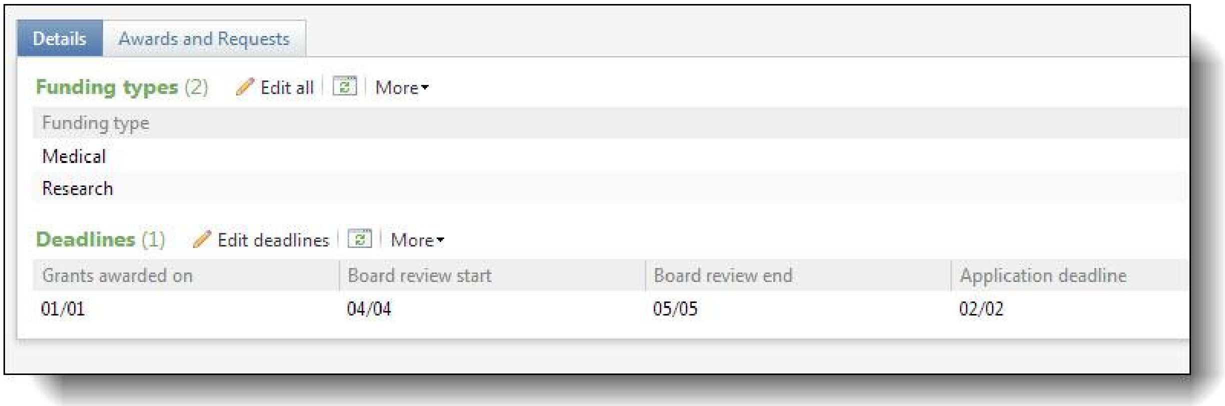
Grant Program Record

From the grant program record, you can view information about the program and any deadlines associated with the grant proposal and award. You can also view information about any grant requests and awards, if your organization is an award recipient.

To access the grant program record, open the grantor record that funds the program. Under **Grant programs**, in the **Title** column, click the program name. The Grant Program page appears.

Grant Program Details

From the Details tab of the grant program record, you can manage information about the funding types and deadlines associated with the grant program.



Funding types (2)

Funding type
Medical
Research

Deadlines (1)

Grants awarded on	Board review start	Board review end	Application deadline
01/01	04/04	05/05	02/02

Under **Funding types**, you can view the types of projects the grantor wants to fund with the program. Under **Deadlines**, the annual deadlines required to receive a grant award through the program appear.

Funding Types

From the Details tab of a grant program record, you can select the types of projects that qualify for the program. For example, you can select a funding type of Research for a grant program that supports medical research. When you add a request to a funding plan, you can search for grant programs by funding type to help determine the programs that meet a specific need.

▶ Edit a funding type

1. On the grant program record, select the Details tab.
2. Under **Funding types**, click **Edit all** on the action bar The Edit grant funding types screen appears.
3. Select the interests a funding plan must address to qualify for the grant program.
4. Click **Save**. You return to the Details tab.

Deadlines

From the Details tab of a grant program record, you can enter the different deadlines required to request a grant award, such as the application due date, board review dates, and grant award date.

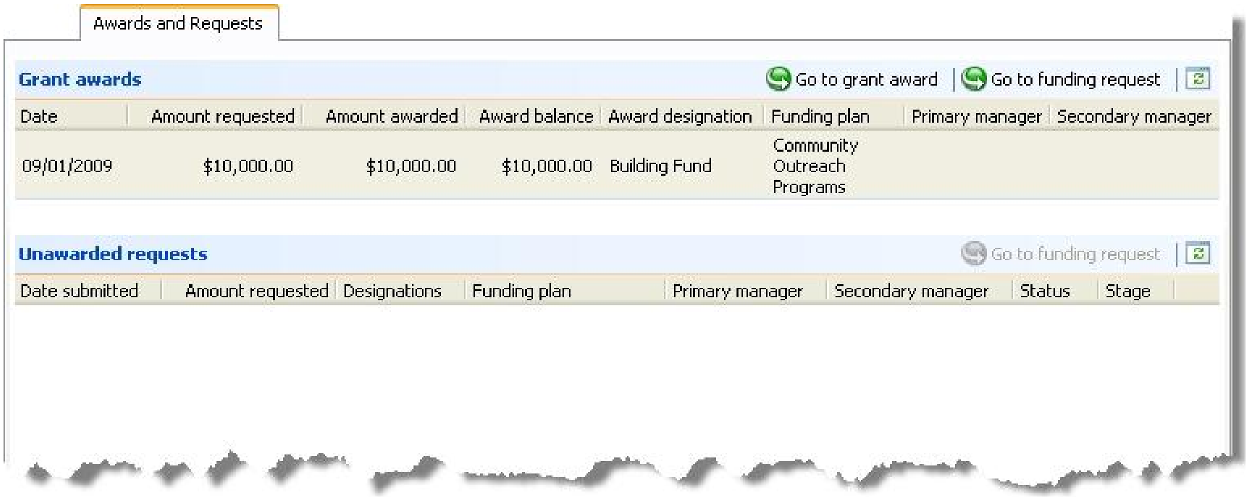
▶ Edit a deadline

1. On the grant program record, select the Details tab.
2. Under **Deadlines**, click **Edit deadlines** on the action bar. The Edit grant program deadlines screen appears.

3. In the grid, enter each applicable deadline in mm/dd format.
4. Click **Save**. You return to the Details tab.

Awards and Requests

From the Awards and Requests tab, you can view details about grant awards you receive. You can also view details for your funding requests submissions that have not received an award.



Grant awards

Date	Amount requested	Amount awarded	Award balance	Award designation	Funding plan	Primary manager	Secondary manager
09/01/2009	$10,000.00	$10,000.00	$10,000.00	Building Fund	Community Outreach Programs		

Unawarded requests

Date submitted	Amount requested	Designations	Funding plan	Primary manager	Secondary manager	Status	Stage

For information about grant awards, see Grant Awards on page 22.

For information about funding requests, see Funding Requests Overview on page 14.

Attributes Tab

From the Attributes tab, you can manage additional details about the grant program. For example, you can view details such as the attribute's value and the date range for the attribute. You can add new attributes, edit details for existing attributes, or delete selected entries from the grid. Depending on the attribute category's configuration, you can enter your own attribute or select from a predefined list.

Note: The Attributes tab does not appear on the page if your database does not include attributes for grant program records. A system administrator adds these attributes from *Administration*, *Attribute categories*. For information about how to create and manage attributes, refer to the *Administration Guide*.

Add Attributes

From the Attributes tab, you can use attributes to store specific details about a grant program. For example, you can use a grant program attribute category of "Award Frequency" to assign "Annually," "Bi-annually," or "Quarterly" frequencies for a grant program. Attributes provide more flexibility because you can include attributes in queries and reports to narrow results.

▸ **Add an attribute**

1. From the Attributes tab, click **Add**. The Add attribute screen appears.
2. In the **Category** field, select the type of attribute to assign.

Tip: When you edit an attribute, you cannot change the category.

3. In the **Value** field, enter or select a value for the attribute. For example, if you have a grant program attribute category of “Award Frequency,” you many enter “Annually,” “Bi-annually,” or “Quarterly.”
4. If the attribute applies to a specific period of time, select the start and end dates.
5. In the **Comment** field, enter additional information about the attribute.
6. Click **Save**. You return to the Attributes tab.

Funding Plan

Funding Plan Record 11

Funding Plan Page 12

Funding Requests Overview 14

Funding Requests Page 17

Grant Awards 22

Grant Award Page 23

View Grant Activity 24

The funding plan contains information about a specific, overall need within your organization. For example, you may create a funding plan for your organization’s community outreach programs. In this plan, you enter the overall funding need for all programs that fall under the community outreach umbrella. You can assign fundraisers to the plan and add funding requests for each grant program you want to pursue to meet the total funding amount needed.

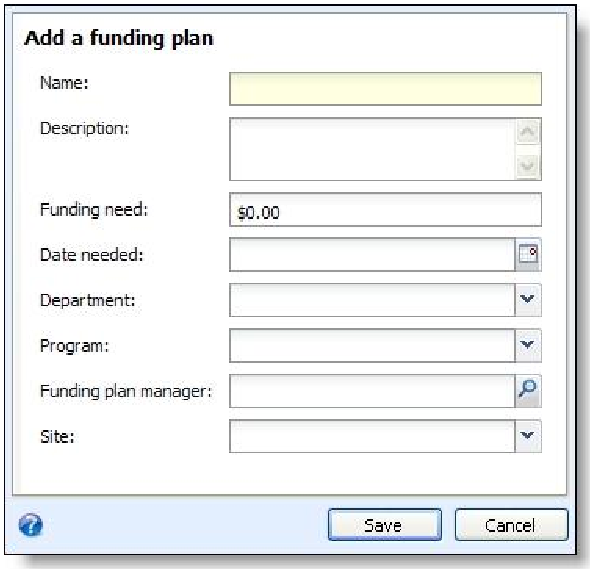
Note: Before you manage information about grants and grant requests, use configuration options to set up *Foundations* for your users. For example, you can define plan outlines and the default credit rules you want to make available. For information about *Foundations* configuration options for grants, refer to Grants Configuration on page 25.

Funding Plan Record

You can create a funding plan for programs or projects within your organization that may be eligible for funding from corporations or foundations.

▸ Add a funding plan

1. From the Foundations page, click **Add a funding plan**. The Add a funding plan screen appears.



2. In the **Name** field, enter the name of the funding plan.
3. In the **Description** field, enter additional information to help identify the funding plan.
4. In the **Funding need** field, enter the total funding amount you want to obtain with this plan.

   After you create the plan, you can add a funding request for each grant program you want to pursue to meet this need.
5. In the **Date needed** field, enter the date fundraisers need to meet the funding goal.
6. In the **Department** field, enter the department this funding plan applies to at your organization.
7. In the **Program** field, enter the program that will receive the funding requested.
8. In the **Funding plan manager** field, enter the name of the fundraiser who creates the grant proposal and makes sure your organization meets the terms of the grant program after you receive an award.

   Note: You can select only constituents with a Fundraiser constituency as the funding plan manager.
9. In the **Site** field, select the site that applies to the funding plan.
10. Click **Save**. The Funding Plan page appears. For information about the Funding Plan page, see Funding Plan Record on page 11.

Funding Plan Page

From the funding plan page, you manage funding requests.

Funding Requests Tab

From the Funding Plan page, on the Funding Requests tab, you manage the funding requests associated with the plan.

A funding plan is a container for one or more funding requests. While the funding plan includes the overall funding requirement for the programs or projects in the plan, the plan’s funding requests include each grant program applied for and the steps required to successfully complete the request process. For more information about funding requests, see Funding Requests Overview on page 14.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. From a record, select the Documentation tab and click **Add**, **Note**. The Add a note screen appears.
2. Select a note type. Enter the date, title, author, and the content of the note.
3. Click **Save**. You return to the Documentation tab.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. From a record, select the Documentation tab and click **Add**, **Media link**. The Add a media link screen appears.
2. Select a media link type. Enter the date, title, and author. Enter the URL for a website or click the edit media URL icon to search for a linked file.
3. Click **Save**. You return to the Documentation tab.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

Add an attachment

1. From a record, select the Documentation tab and click **Add**, **Attachment**. The Add an attachment screen appears.

2. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
3. Click **Save**. You return to the Documentation tab.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

Funding Requests Overview

After you identify the areas of need and the corresponding funding amounts required, you can create a funding request for each grant program you need to pursue to obtain the overall funding need. For each funding request, you enter the grant program name, along with the status, amount, and submission date. You also create an outline that identifies the steps required to complete the request process.

The step outline defines each action a fundraiser must complete to meet the application requirements for the funding request. For example, you may have a plan step for a fundraiser to submit a letter of intent to the grantor. When the fundraiser submits this letter, you can mark the step complete. With a request outline, you can track completed and pending steps to determine your organization's progress toward the completing the grant program application process.

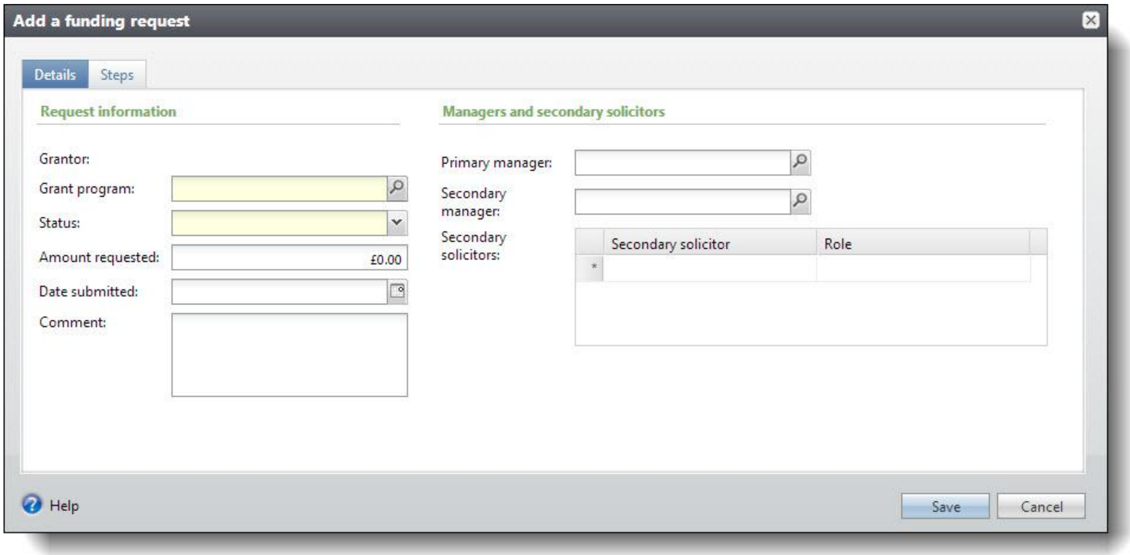
After you create a funding request, you can enter grant awards in response to the request, select the designations to associate with this funding, assign additional fundraisers, or add documentation to the request.

Add Funding Requests

You can add a funding request for each grant program you want to pursue to meet the funding plan's target amount.

▸ **Add a funding request - Details tab**

1. From the Funding Plan page, on the Funding Requests tab , click **Add**. The Add a funding request screen appears and defaults to the Details tab.


Add a funding request
Details
Steps
Request information
Grantor:
Grant program:
Status:
Amount requested:
£0.00
Date submitted:
Comment:
Managers and secondary solicitors
Primary manager:
Secondary manager:
Secondary solicitors:
Secondary solicitor
Role
Help
Save
Cancel

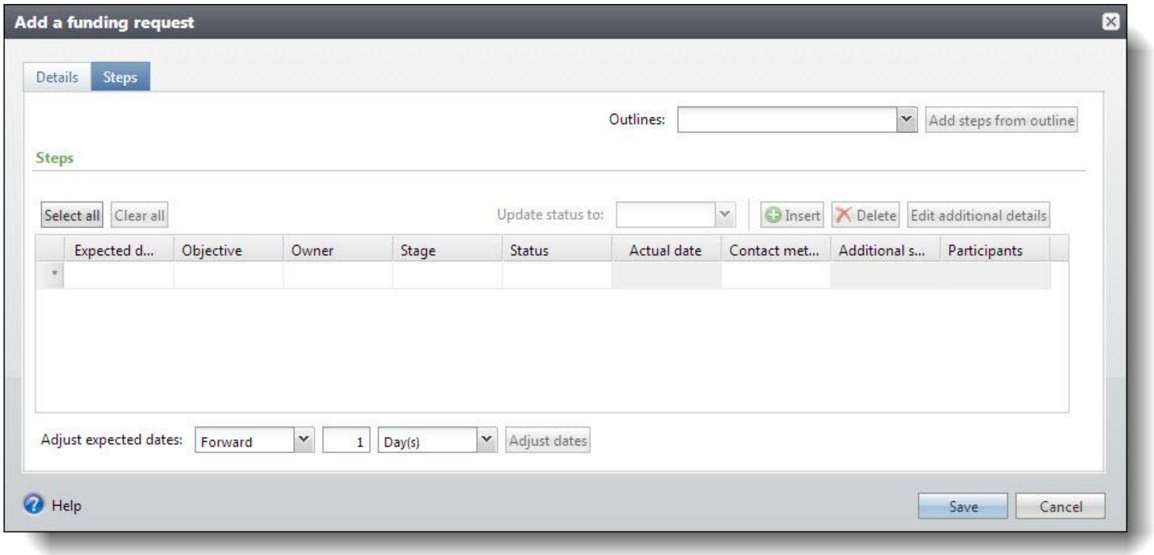
2. In the **Grant program** field, select the name of the grant program for the funding plan.
3. When you select the grant program, the name of the grantor that funds the program appears in the **Grantor** field.
4. In the **Status** field, select the current status of the request.
5. In the **Amount requested** field, enter the total amount for funding request.
6. In the **Date submitted** field, enter the date your organization submitted the request.
7. In **Comment** field, enter additional information about the request.
8. In the **Primary manager** field, select the constituent you want to coordinate the grant proposal process.
9. In the **Secondary manager** field, select the constituent you want to act as a secondary manager.
10. In the **Secondary solicitors** grid, enter each fundraiser you want to assist with the funding request and select a role for each fundraiser.

    > ***Note:*** You can select only constituents with a "Fundraiser" constituency for the primary manager, secondary manager, and secondary solicitor roles.

11. Click **Save**. You return to the Funding Plan.

Add a funding request - Steps tab

1. From the Funding Plan page, on the Funding Requests tab, click **Add**. The Add a funding request screen appears.
2. To add steps from a funding request outline you previously created or manually enter steps for the request, select the Steps tab.


Add a funding request
Details
Steps
Outlines:
Add steps from outline
Steps
Select all
Clear all
Update status to:
Insert
Delete
Edit additional details
Expected d...
Objective
Owner
Stage
Status
Actual date
Contact met...
Additional s...
Participants
Adjust dates
Help
Save
Cancel

Adjust expected dates: Forward 1 Day(s)

3. In the **Outlines** field, select the step outline to add to this request. To add the steps to the grid, click **Add steps from outline**.

   To add steps from multiple outlines, select another outline and click **Add steps from outline** again. If an outline does not exist, you must manually add steps to the funding request. For information about how to create funding request outlines, refer to Funding Request Outlines on page 25.

Tip: To change the status of one or more entries in the steps grid, select the steps to update, then select a status from the **Update status to** field. To add a step to the grid, click **Insert**. To add the step in a specific location, select the row below where you want the step to appear and click **Insert**. To remove a step, select the row in the grid and click **Delete**. To further customize a selected step, click **Edit additional details**. You can add comments and enter the solicitors and participants you want to assist with the step.

4. In the **Expected date** column, enter the due date for the step.

   If you added steps from an outline, the program uses the entry in the **Days from start** field on the funding request outline and the date you add the outline to the plan to automatically calculate the expected date.

5. In the **Objective** column, enter the purpose for the step.

   In the **Owner** column, select the fundraiser responsible the step. You can select only constituents with a Fundraiser constituency as the step owner. If you added steps from an outline, the name of the individual assigned to the fundraiser role (funding plan manager, primary manager, or secondary manager) associated with the outline step appears in the column by default.

6. In the **Stage** column, select the stage of the request associated with this step.

Note: A system administrator adds the available options from the drop down in the **Stage** column from *Administration*, *Code tables* for the **Funding Request Stage** code table. The available options your organization decides to configure can be a series of text options or a list of numerical values. Examples of text options include “Approval,” "Award," and “Preparation.” Examples of a numerical list are "1,", "2," and "3." For information about how to create and manage code tables, refer to the *Administration Guide*.

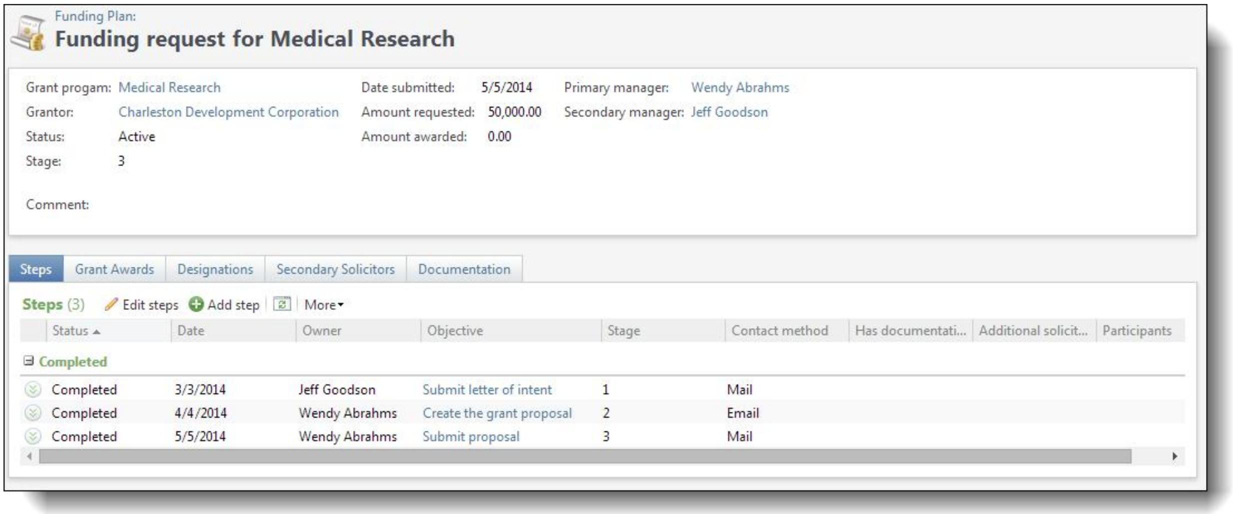
7. In the **Status** column, select whether the step is planned, pending, or completed.

8. In the **Actual date** read-only column, the date you mark a step complete defaults automatically.
9. In the **Contact method** column, enter the type of contact required for this step.
10. In the **Additional solicitors** column, if the step requires assistance from multiple solicitors, select "Yes."
11. In the **Participants** column, if the step requires additional participants, select "Yes."
12. In the **Adjust expected dates** fields, select the steps to update. You can select "Forward" or "Backward" and enter the interval of time in days, weeks, or months. To apply your changes, click **Adjust dates**.
13. Click **Save**. You return to the Funding Plan.

Funding Requests Page

From the funding request page, you can manage and track the progress of steps in the request process, enter information about any grant awards you receive for the request, add constituents who assist in the process, and add documentation about the program that requires funding, the grantor, or other related areas.

From the Funding Plan page, to access the Funding Requests page, click the name of the request on the Funding Requests tab. The Funding request page appears.



Grant progam: Medical Research
Grantor: Charleston Development Corporation
Status: Active
Stage: 3
Comment:
Date submitted: 5/5/2014
Amount requested: 50,000.00
Amount awarded: 0.00
Primary manager: Wendy Abrahms
Secondary manager: Jeff Goodson

Status	Date	Owner	Objective	Stage	Contact method	Has documentati...	Additional solicit...	Participants
Completed								
Completed	3/3/2014	Jeff Goodson	Submit letter of intent	1	Mail			
Completed	4/4/2014	Wendy Abrahms	Create the grant proposal	2	Email			
Completed	5/5/2014	Wendy Abrahms	Submit proposal	3	Mail			

Steps Tab

The Steps tab displays the planned, pending, and completed steps for the funding request. On this tab, you can view and manage the steps associated with the funding request. For each funding request you add to a funding plan, you can add steps to manage and track communication deadlines and requirements. These steps detail the tasks required to complete the application and grant proposal process for the selected grant program. For example, you may have a step to submit a letter of intent to the grantor, a step to create the grant proposal, and a step to submit the proposal before the application deadline. As each step owner completes a step, you can change the step's status to complete and attach any associated documentation to the step. If your organization receives the grant award, you create additional steps to manage the requirements your organization must meet as part of the terms and conditions of receiving the award.

Add Documentation to a Step

You can attach specific types of documents to a step. Details for all documents attached to the steps appear on the Documentation tab of the corresponding step page.

Add a note, media link, or attachment to a step

1. From the Steps tab, click the arrows beside the step to edit to expand its row. and then click **Add documentation**. The documentation items types appear for you to select.
    - To add a note, select **Note**. The Add a note screen appears
    - To add a link, select **Media link**. The Add a media link screen appears.
    - To add an attachment, select **Attachment**. The Add an attachment screen appears.
2. Enter the necessary information for the documentation type. For more information about the screens, refer to the *General Features Guide*.
3. Click **Save**. You return to the Steps tab.

Edit All Steps

On the Funding requests page, on the Steps tab, you can edit all steps in a plan.

Edit all steps in a funding request

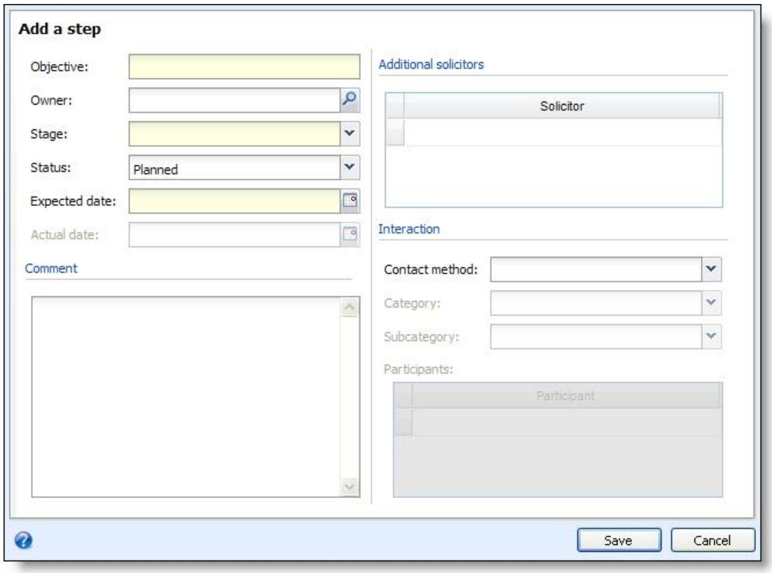
1. To edit all steps in a plan, on the Steps tab, under **Steps**, click **Edit steps**. The Edit funding request steps screen appears.
2. You can edit the steps as necessary. The items on this screen are the same as the items on the Steps tab on the Add a funding plan screen. For more information, refer to Add a funding request - Steps tab on page 15.
3. Click **Save**. You return to the Steps tab.

Add Steps

On the Funding requests page, on the Steps tab, you can add an individual step for an existing request.

Add a step

1. On the Funding request page, on the Steps tab, click **Add step**. The Add a step screen appears.


Add a step
Objective:
Owner:
Stage:
Expected date:
Actual date:
Comment
Additional solicitors
Solicitor
Interaction
Contact method:
Category:
Subcategory:
Participants:
Participant
Save
Cancel

Status: Planned

2. In the **Objective** field, enter the purpose for the step.
3. In the **Owner** field, the primary manager's name for the funding plan defaults automatically. To enter a different name, click the magnifying glass. You can select only constituents with a Fundraiser constituency as the step owner.
4. In the **Stage** field, enter the stage of the request associated with this step. For example, you can enter "Identification" or "Proposal."
5. In the **Status** field, select whether the step is planned, pending, or completed.
6. In the **Expected date** field, enter the due date for the step.
7. When you select "Completed" in the **Status** field, the **Actual date** field enables. In this field, enter the step completion date. When the step status is "Planned" or "Pending," the field is disabled.
8. In **Comment**, enter additional information about the step.
9. In the **Additional solicitors** grid, enter each fundraiser you want to assist with the step. You can select only constituents with a "Fundraiser" constituency as solicitors on the request.
10. Step three In he **Contact method** field, enter the type of contact required for this step.

    If your organization defines categories and subcategories for contact types, you can enter this information in the **Category** and **Subcategory** fields.
11. In the **Participants** grid, enter each participant you want to assist with the step. You can select participants without the Fundraiser constituency on the constituent record.
12. Click **Save**. You return to the Steps tab.

Mark Steps Complete

From the Funding request page, you can mark a step complete. To do this, on the Steps tab, click the arrows beside the step to expand its row and then click **Step**, **Mark complete**. The Mark step complete screen appears. On this screen, enter the date, start time, and end time the owner completed the step. Click **Save**. You return to the Steps tab. In the **Steps** grid, the date you entered appears in the **Date** column.

Manage Step Responses

You can track responses you receive for each step. For example, if a grantor calls your organization in response to a letter of an intent, you can enter this interaction for the step. On the Funding request page, on the Steps tab, click the arrows beside the step to expand its row and then click **Step**, **Responses**. The Edit responses screen appears. On this screen, enter the date you received the response, the response category, and the response.

Tip: The read-only **Code** column displays the code that corresponds with the response. From *Marketing and Communications*, you manage response categories, types, and codes from **Configuration**, **Response categories and responses**. For more information, refer to the *Communications Guide*.

Grant Awards Tab

From the Funding request page, on the Grant Awards tab, you can enter award details when you receive notification of a grant award. For information about how to manage grant awards, refer to Grant Awards on page 22.

Designations Tab

From the Funding request page, on the Designations tab, you determine the designations to associate with the funding request. When you receive a grant award, you can apply award payments to this designation.

▶ **Add designations**

1. On the Funding request page, on the Designations tab, click **Edit all**. The Edit funding request designations screen appears.
2. In the grid that appears, enter each designation to credit when you receive a grant award payment.
3. Click **Save**. You return to the Designations tab.

Secondary Solicitors Tab

From the Funding request page, on the Secondary Solicitors tab, you can enter each fundraiser you want to assist with the funding request and select a role for each fundraiser. To add, edit, or delete solicitors, click **Edit all**.

Note: You can select only constituents with a Fundraiser constituency for the secondary solicitor role.

Documentation Tab

From the Funding request page, on the Documentation tab, you can attach specific types of documents to a funding request. For more information about how to manage documentation, refer to the *General Features Guide*.

Attributes Tab

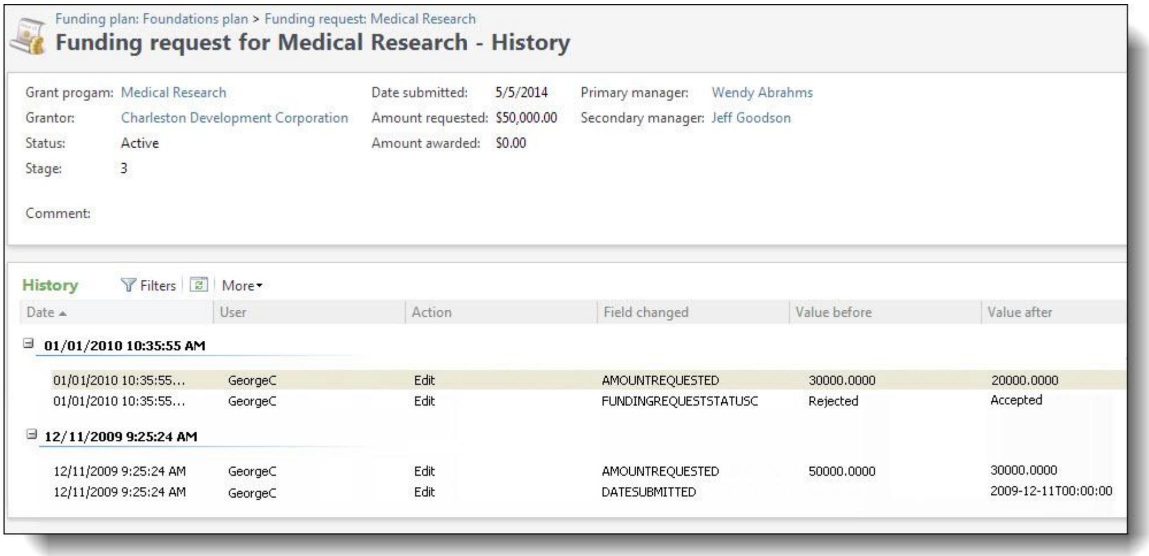
From the Funding request page, on the Attributes tab, you can include additional details about a funding request. For example, you can view details such as the attribute's value and the date range. You can add new attributes, edit specific details for existing attributes, or delete selected entries from the grid. Depending on the attribute category's configuration, you can enter your own attribute or select from a predefined list.

Note: The Attributes tab does not appear on the page if your database does not include attributes for fund requests records. A system administrator adds these attributes from *Administration*, *Attribute categories*. For information about how to create and manage attributes, refer to the *Administration Guide*.

Funding Request History

From the Funding request page, you can view a history of changes made to the funding request over time. To access this view, under **More information**, click **History**. The Funding request - History page appears.

The **History** grid displays the date and time a staff member created the funding request, as well as the initial amount requested and the date the request was submitted. You can also view any changes to the request's status or amount. For example, you submitted a request for $50,000. The grantor rejected the request, so your organization reviewed the funding request and submitted an updated request for $25,000, which the grantor accepted. The Funding request - History page for this request shows each change. You can use this information to determine the amounts and types of requests a specific grantor is likely to fund.


Funding plan: Foundations plan > Funding request: Medical Research
History
Filters
More▾

Funding request for Medical Research - History

Grant progam: Medical Research
Grantor: Charleston Development Corporation
Status: Active
Stage: 3
Comment:
Date submitted: 5/5/2014
Amount requested: $50,000.00
Amount awarded: $0.00
Primary manager: Wendy Abrahms
Secondary manager: Jeff Goodson

Date ▲	User	Action	Field changed	Value before	Value after
01/01/2010 10:35:55 AM					
01/01/2010 10:35:55...	GeorgeC	Edit	AMOUNTREQUESTED	30000.0000	20000.0000
01/01/2010 10:35:55...	GeorgeC	Edit	FUNDINGREQUESTSTATUSC	Rejected	Accepted
12/11/2009 9:25:24 AM					
12/11/2009 9:25:24 AM	GeorgeC	Edit	AMOUNTREQUESTED	50000.0000	30000.0000
12/11/2009 9:25:24 AM	GeorgeC	Edit	DATESUBMITTED		2009-12-11T00:00:00

You can filter the results in the **History** grid to display the information that appears. For example, you can limit the entries to changes made during a specific period of time or by a specific user, or you can view certain actions, such as edits made to the funding request information.

Grant Awards

When you receive a grant award notification, you can enter the award and installment information on the corresponding funding request. From the Grant Awards tab, you can add and manage grant award information.

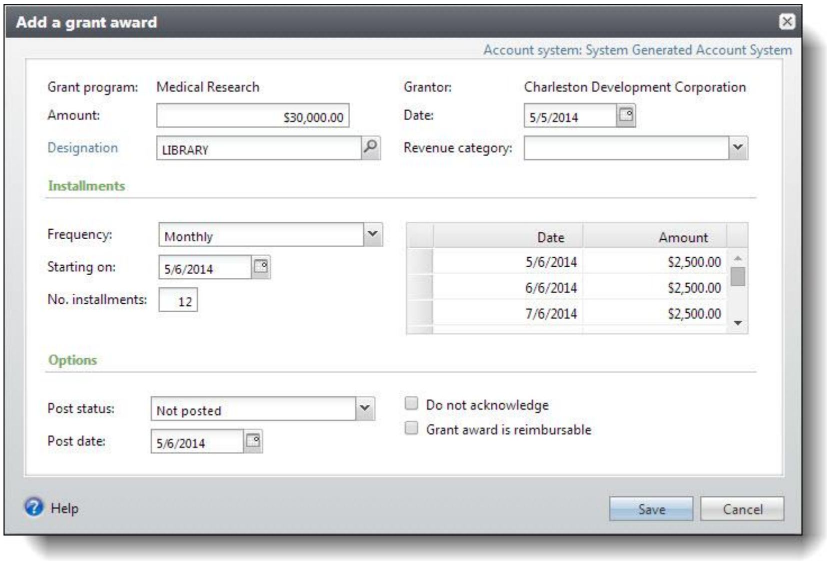
Add Grant Awards

On the Grant Awards tab for a funding request, you can manage grant award information from a grantor. The grantor determines the amounts and installment schedule for each grant program.

After you add a grant award, you can add payments as installments toward the award. If you do not receive payments in advance but instead request reimbursement from the grantor for expenses that qualify, you can indicate that the grant is reimbursable. A grant award is a specific revenue type so revenue toward grant award installments can appear in revenue reports.

▶ Add a grant award

1. From a funding request record, select the Grant Awards tab.
2. Under **Grant awards**, click **Add** on the action bar. The Add a grant award screen appears.



Add a grant award

Account system: System Generated Account System

Grant program: Medical Research

Grantor: Charleston Development Corporation

Amount: $30,000.00

Date: 5/5/2014

Designation: LIBRARY

Revenue category:

Installments

Frequency: Monthly

Starting on: 5/6/2014

No. installments: 12

Date	Amount
5/6/2014	$2,500.00
6/6/2014	$2,500.00
7/6/2014	$2,500.00

Options

Post status: Not posted

Post date: 5/6/2014

☐ Do not acknowledge

☐ Grant award is reimbursable

When you add a grant award from a funding request, the **Grant program** and **Grantor** fields appear to display the grant program and grantor associated with the funding request.

When you add a grant award from a major giving opportunity, the **Prospect** field appears to display the prospect associated with the opportunity.

3. When your organization configures multiple general ledger account systems and implements site security, and you have rights to work with multiple account systems, the **Account system** link appears on the top right of the screen and displays the default account system. To apply the grant award to another account system, click the link and select the account system to use.

Warning: After you save the grant award, you cannot edit its account system. To apply a saved grant award to a different account system, you must delete the grant award and add it again.

Tip: We recommend you associate each site in your organization with one general ledger account system.

4. In the **Amount** field, enter the grant award amount.
5. In the **Designation** field, select the designation for the grant award.

   To apply the grant award to multiple designations, click **Designation** and select the applicable designations and amount distribution.
6. In the **Date** field, enter the grant award notification date.
7. In the **Revenue category** field, select the revenue category for the award. You can use the revenue category to properly map the revenue to the general ledger. Your system administration configures the selections available in the **Revenue category** field.

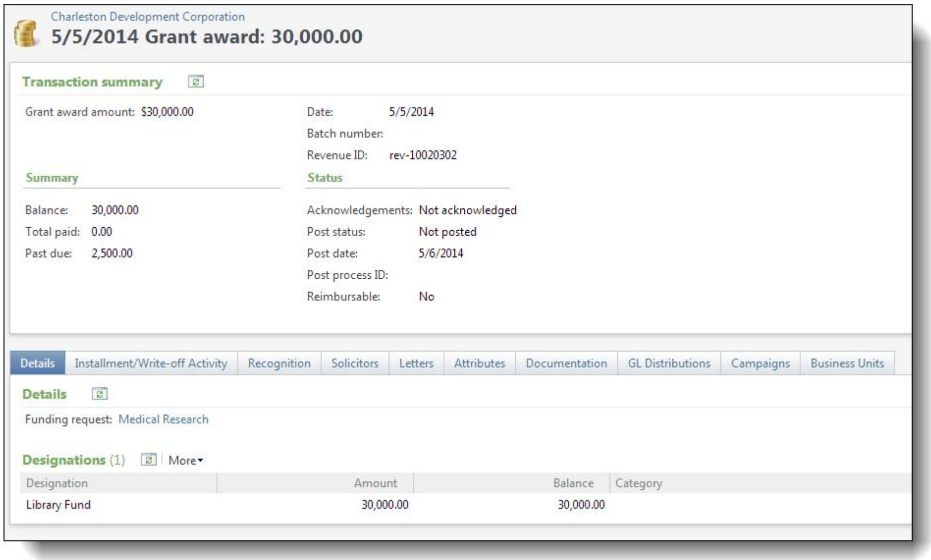
   For information about how to configure revenue categories, refer to the *Revenue Guide*.
8. Under **Installments**, set up the installment schedule for the grant award.
   a. In the **Frequency** field, select the frequency of the award installments. For example, select "Monthly."
   b. In the **Starting on** field, enter the due date of the first installment.
   c. In the **No. installments** field, enter the number of payment installments for the grant award.

   Note: You cannot enter a number for installments for the grant award when you select "Irregular" or "Single installment" in the the **Frequency** field.

   d. The grid uses the frequency, start date, and installment number to calculate and display the regular installment schedule for the grant award. To set up an irregular installment schedule, you can edit the **Date** and **Amount** columns as necessary.
9. Under **Options**, select whether to post the grant award to the general ledger and whether to send an acknowledgement for the award.
   a. In the **Post status** field, select whether to post the grant award to the general ledger. If you select "Not posted," in the **Post date** field, enter the date to post the revenue to the general ledger. For example, you can enter the same date as the payment installment date. The post date does not have to be the same as the date the post process is run or the date the grant award enters the program. By default, today’s date appears.
   b. If you do not want to send an acknowledgement for the grant award, select **Do not acknowledge**. When you do this, acknowledgement processes do not assign a letter to the award.
   c. If the terms of the grant award require that your organization incurs expenses for the grant program and then submits a request for reimbursement to the grantor, select **Grant award is reimbursable**.
10. Click **Save**. You return to the Grant Awards tab.

Grant Award Page

On the Grant award page, several tabs display information about a specific award. For example, you can view information about recognition credits, solicitors, letters, general ledger distribution, documentation, and campaigns for the award. You can also manage additional information such as installments, write-offs, designations, and payment information. For more information about these, refer to the *Revenue Guide*.



Charleston Development Corporation

5/5/2014 Grant award: 30,000.00

Transaction summary

Grant award amount: $30,000.00

Date: 5/5/2014

Batch number:

Revenue ID: rev-10020302

Summary

Balance: 30,000.00

Total paid: 0.00

Past due: 2,500.00

Status

Acknowledgements: Not acknowledged

Post status: Not posted

Post date: 5/6/2014

Post process ID:

Reimbursable: No

Details

Funding request: Medical Research

Designations (1)

Designation	Amount	Balance	Category
Library Fund	30,000.00	30,000.00	

At the top of the page, the grantor's name associated with the award displays as a link. To view the grantor's constituent record, click the link.

The table below explains the items on the Grant award page.

Screen Item	Description
Grant award amount	Displays the total amount of the grant award.
Date	Displays the grant award notification date.
Batch number	If the grant award was added to the program in a batch, this field displays the number for that batch. If the award was not added in a batch, the field is blank.
Revenue ID	Displays the lookup ID assigned to the grant award. When you search for the award, you can use the lookup ID to quickly find it.
Summary fields	Displays the total outstanding balance of the grant award, the total amount paid toward the award, and the total amount past due.
Status fields	Displays whether the program generated acknowledgements for the grant award and the post status and post date of the award. You can also view whether the grant award is reimbursable. To view a list of all transactions posted to the general ledger, click the ID in the **Post process** field. The Post to GL – Included Transactions report for the post process appears.

View Grant Activity

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. For information about how to consolidate your view of grants and major giving management, see Consolidate Grants and Major Giving on page 27.

Grants Configuration

Funding Request Outlines 25

Solicitor Revenue Credit 26

Consolidate Grants and Major Giving 27

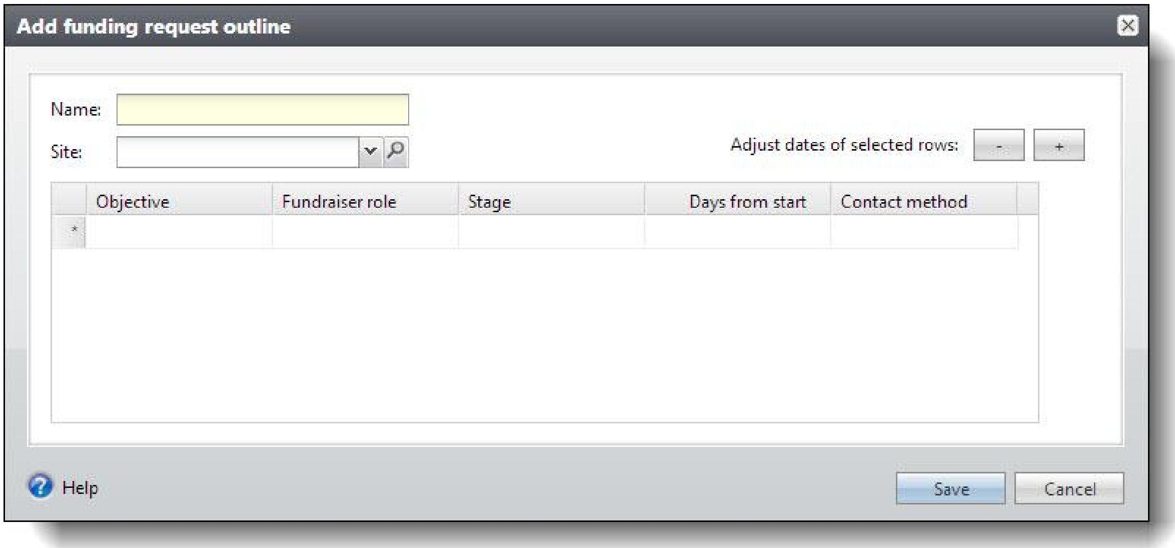
Use configuration options to set up *Foundations* for your users. For example, you can define plan outlines and the default credit rules you want to make available.

Funding Request Outlines

Before you add a funding request to a funding plan, you can create a funding request outline. These outlines include basic steps such as meetings or phone calls that fundraisers or solicitors perform as part of the grant proposal process. With an outline, you can add multiple, related steps to a funding request at one time. After you add outline steps to a funding request, you can edit these steps, add new steps, or manually create steps as requirements change. For each outline, you can view the name, the number of stages included in the outline, and the number of steps.

▸ Add a funding request outline

1. From *Foundations*, under **Configuration**, click **Funding request outlines**. The Funding Request Outlines page appears.
2. Under **Funding request outlines**, click **Add** on the action bar. The Add funding request outline screen appears.


Add funding request outline
Name:
Site:
Adjust dates of selected rows:
-
+
Objective
Fundraiser role
Stage
Days from start
Contact method
*
Help
Save
Cancel

3. In the **Name** field, enter a unique name to help identify the request outline.
4. To restrict the use of the outline to a specific site at your organization, in the **Site** field, select the site to use the outline.
5. In the grid, enter the steps of the outline.
    a. In the **Objective** column, enter the purpose of each step.
    b. In the **Fundraiser role** column, select the fundraiser role to perform each step.

    Tip: When you add the outline to a funding request, the name of the individual who acts within the role appears. If no fundraiser is assigned to the selected role, the column remains blank.

    c. In the **Stage** column, select the stage of the request associated with this step, such as "Identification" or "Proposal."
    d. In the **Days from start** column, enter the number of days after the start date for each step to occur. The start date is the day you add the template step to a funding request.

    For example, to have the funding plan manager submit a proposal two weeks after you add a step to a funding request, enter 14 for the step. The program calculates the calendar date for the step to occur based on the date you add the step to the request and the number of days entered here.

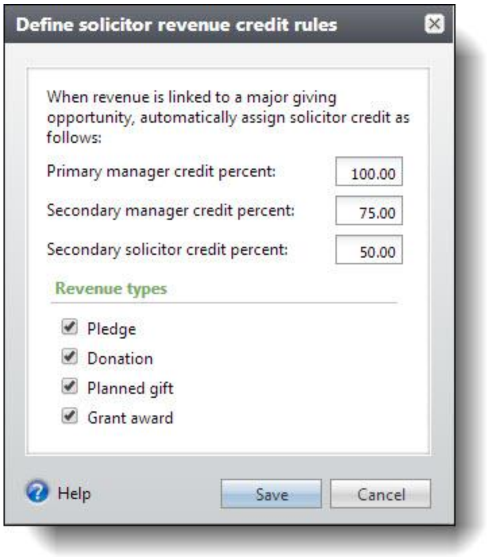
    e. In the **Contact method** column, enter the type of contact required for each step.
6. Click **Save**. You return to the Funding Request Outlines page.

Solicitor Revenue Credit

When you create a funding request on a funding plan, you can assign solicitors to the request to perform various steps you define for the request. After the grantor submits a grant award, you can credit the plan's solicitors for the revenue you receive. To simplify this process, you can define default credit rules for plan solicitors. When you apply revenue to the grant award, solicitors linked to the associated funding request automatically receive credit based on the credit rules you create. On the Credit Rules Setup page, you can view and manage the default credit rules for plan solicitors. To access this page from *Foundations*, under **Configuration**, click **Credit rules setup**.

▸ **Edit solicitor revenue credit rules**

1. From *Foundations*, under **Configuration**, click **Credit rules setup**. The Credit Rules Setup page appears.
2. Under **Solicitor revenue credit rules**, click **Edit** on the action bar. The Define solicitor revenue credit rules screen appears.



When revenue is linked to a major giving opportunity, automatically assign solicitor credit as follows:

Primary manager credit percent: 100.00
Secondary manager credit percent: 75.00
Secondary solicitor credit percent: 50.00

Revenue types

☑ Pledge
☑ Donation
☑ Planned gift
☑ Grant award

3. At the top of the screen, enter the credit amount, up to 100 percent, to automatically assign to the primary manager, secondary manager, and secondary solicitors assigned to a funding request.
4. Under **Revenue types**, select the types of revenue to credit to solicitors.

   Note: To credit solicitors for grant award revenue, select **Grant award**. When you enter a payment for a grant award and select the appropriate funding request commitment to apply the payment to, the program automatically credits the solicitors on the funding request for the revenue received based on the default credit rules you defined.

5. Click **Save**. You return to the Solicitor Credit Rules page.

Consolidate Grants and Major Giving

To view grant activity in key performance indicators (KPIs) and reports, you must consolidate grants with major giving management. From *Prospects*, click **Major giving setup** under **Configuration**. From the Major Giving Setup page, click **Include grants in major giving management** under **Configuration**. When you apply this setting, grant activity appears in *Prospects*.

- On a fundraiser’s My fundraiser page, the steps assigned to the fundraiser on a funding request appear. From the Grants tab, individuals can view information about their fundraising activity related to grants.
- On the Major Giving Management – Prospects page, current grant activity appears under **Grants in Pipeline** on the Pipeline tab.
- On the Major Giving Management – Opportunities and Asks page, grant funding request information appears under **Funding request summary** on the Summary tab.

If you previously included grant activity but no longer want to have a consolidated view, click **Exclude grants from major giving management**.