

Grant management

Unit4 Nonprofit Model capability overview

Nonprofits are under increasing pressure from a complex and rapidly changing world. Not only is pressure building from external forces such as rising demands for service, restrictive grant conditions, and limited funding, but also internally, with operational complexity, and changing regulatory reporting requirements driving the need for greater compliance and accountability.



Grant funding allocation made easier

Transparency in the management of grants is crucial for building trust with donors and stakeholders. The ability to track grant funding from the point it enters the organization, through to how and where it is used, and the impact it delivers, is essential. Thankfully, this no longer needs to be an arduous Excel task.

Given all these factors, it is vital to make the right decisions on the right solution to meet the specific needs and interoperability of your nonprofit. With Unit4's integrated grant management solution you get:

- Better management of grant funding and spending
- Reduced administration and manual data analysis
- Increased credibility and accountability
- Maximized use of funds and resources
- Increased stakeholder confidence, leading to future grant awards
- Easier re-allocation of indirect costs that aren't associated with a particular grant

Pre-built for nonprofits

Unit4's solution for grant management has been tailored to meet the needs of nonprofits. It provides all the information and automates workflow in all stages of the grant process, allowing for increased transparency and better tracking against project and mission impact reporting.

Comprehensive grant reporting becomes easier with templates for regulatory reports simplifying the process. Sub-grant tracking enables organizations to share or allocate funds via their own grant-making process, from within Unit4 ERP, through our Source-to-Contract Scanmarket solution.

Workflows, approvals, and project progress reporting can be established quickly, without development, and are designed to meet any specific grant conditions, including regional regulations or grant policies. Unit4's ERP provides the transparency and compliance needed to deliver specific programs or services.

Simplifying complexity

The financial requirements of a nonprofit are complex - they require accurate and detailed records especially when working in multiple geographies. Information needs to be easily accessible for review by stakeholders and regulators but often requires access to multiple systems and siloed spreadsheets.

A built-for-purpose ERP streamlines grant management by using industry-standard processes for all fields and reports, expenses, and payments. This delivers the transparency needed for sub-grantee organizations to carry out specific programs or services.

Grant management integration

Unit4 ERP rationalizes the process of grants and awards across pre-awards & proposals, post-award registration, sub-recipients, sub-awards, and disbursements.

Pre-awards & proposals

A portfolio of all pre-award information, and a detailed workplace to support the award manager, are available and include the pre-award main details, proposed amount and likelihood, the team working on it, attached documents, workflow tasks, critical reports, and report deadlines. A wide range of metrics and KPIs are available in pre-built dashboards.

Links are available to the following activities:

- Pre-award record to amend associated pre-award details
- Pipeline of all pre-award proposals per status; pipeline dashboard containing the current pre-awards per status, per potential donor and period. It also displays the total awarded amount and success rate across proposals as well as per the funded amount
- Budget entry and amendment

Why Unit4?

- Track grant income across actuals, forecast, budget, and plan
- Monitor awarded and not-awarded grant income
- Allocate income grants by award, currency, donor, and projects
- Separate grant income from that of sponsorships, donations, restricted or unrestricted funding types
- Manage grants in context to expenditure on personnel, procurement, travel, and administration

Note that full grant management capabilities, including pre-award management and sub-awarding, are provided to Unit4 via Fluxx with integration to ERP.

“It’s no exaggeration to say that, thanks to Unit4, we can now track the pound someone donates through a television appeal right through to it being used to improve literacy in Rwanda.”

Julian McGovern
Chief Information Officer, Save the Children International

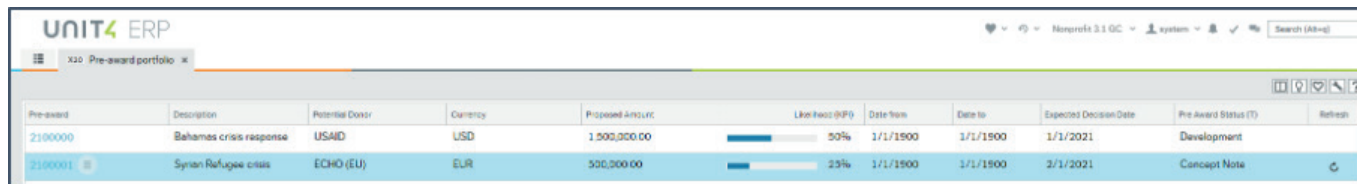


Figure 1: Pre-award portfolio

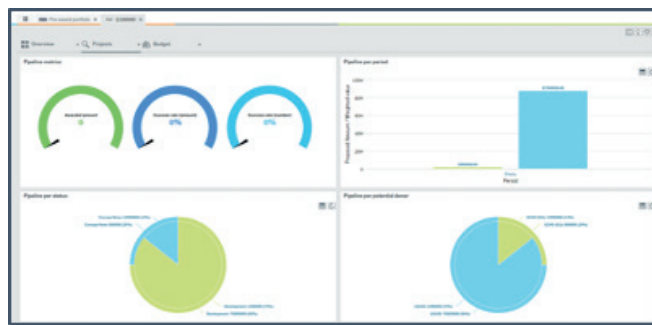
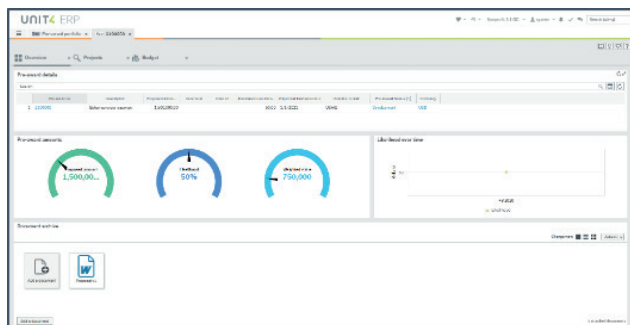


Figure 2: Pre-award workspace

“The data that Unit4 gives us is a real differentiator for donors when grant proposals arise. We have dramatically improved our audit results since implementation, and the easy-to-generate reports safeguard trust with our funders because we can easily demonstrate accountability to their requirements”

Stephe Dean, IT Director
Medical Teams International

Post-award registration

In the post-award workflow, the details from the grant agreement are captured, and the document itself is attached. The award is used in the processing of income and is used to allocate project expenditure against it, as it is one of the accounting dimensions within the General Ledger. The solution provides an overlook of award information and attaches relevant documents:

- Relations: award labels for reporting purposes
- Action overview: shows the list of workflow actions mainly when the award is created initially
- Details: information about the award (e.g., donor, awarded amount, the purpose of the award, project reports, award currency and exchange rate table to be used)
- Categories: award budget line mapping to the internal chart of accounts for donor reporting purposes
- ICR rates: detail of the ICR (Indirect Cost Rate) applied in the agreement
- Team: award team and tasks specified for donor reporting purposes and alerts
- Sub-awards: lists all the award-related sub-awards
- Budget: shows the award budget
- Financial transactions: shows the open and paid installments on the award

Sub-awards

A commitment is created to a sub-awardee for paying for their services delivered. Unit4 ERP captures the sub-award and matches received invoices (for time and expense agreements) or payment requests (for installment-based agreements) to be entered and matched with the sub-award.

The sub-award record is captured as a Purchase order with a specific sub-awarding product group and product, connecting the different installments and deliverables of the contract to a specific award as order lines. The sub-awarded amount is entered, creating a commitment on the sub-award level. In the case of multiple installments, the solution allows multiple lines to be entered with their periods and due dates, which results in commitments being reported in the correct due periods.

Disbursements

A sub-award can be reimbursed, either in installments or using actual costs that occurred based on time & expenses. Therefore, the invoice registration process allows matching with the sub-award. It supports incoming invoices or payment requests to be matched against the sub-awards.

The process automatically creates an open payable for payment to the sub-awardee. In the approval process of these invoices, the sub-award

information is shown as a reference. The open commitment is updated with the reimbursed amounts, and the consumption of the sub-award is shown. It can be reported in project and award/donor reports.

Saving you time with grant management

Imagine if you could more easily manage your income, revenue, grants, and funding, with more reliable reporting and revenue recognition. Unit4's Nonprofit model provides integrated workflows - optimizing grant management, procurement, expenses, and projects, meaning reporting instantly becomes less time-consuming. Increased operational complexity is handled with ease and you can deliver against any sudden shifts in service, demand, or funding. Being able to simplify how you meet regulatory requirements and track grant restrictions ensures greater transparency and accountability across your organization.

