How You Can Use GrantAlytics to Optimize Your Grant Reporting

GrantAlytics was built for nonprofits to optimize their pre-award and post-award grant management and budgeting processes.

GrantAlytics integrates with your time and attendance and payroll systems to seamlessly deliver both holistic and detailed looks at your actuals vs. budget. It was developed specifically to help nonprofits stay focused on their mission by reducing the time required to aggregate data from disparate systems, improve grant and program reporting accuracy, stay compliant and provide better visibility into over and underspending.

Why GrantAlytics?

Every year, **nonprofits waste countless hours on grant budgeting, reporting and tracking instead of focusing on their mission**. It's a mess of data across a sea of software programs that don't work together. Most non-profits are still using spreadsheets to track their grant performance and budgeting. This means their reporting is subject human error and therefore isn't painting an accurate picture of grant performance.

Traditional Methods

VS

Using GrantAlytics

Traditional Methods	Using GrantAlytics
✗ Spreadsheets are 80% error-prone	✓ Error-free data reporting based on actual data, not estimates
✗ Grants in the pre-award stage don't have reporting infrastructure in place	✓ Higher visibility into your grant performance
✗ Manually tying together data from multiple sources (more errors!)	✓ Seamless integration with your existing time & payroll systems
✗ No clean way to reconcile down to an individual's spend	✓ Ability to maintain individual, detailed budgets by grant
✗ Delayed totals from a slow accounting system	✓ Data and dashboards are refreshed every pay period
✗ Lower productivity thanks to duplicate efforts and errors	✓ Higher team productivity
✗ Missed funding because you couldn't prove prior performance	✓ Proof of performance and detailed reports to back it up
✗ Spreadsheets that look unprofessional to auditors	✓ Better preparation for audits
✗ Hours of time lost on tedious reporting	✓ More time to focus on your mission

Who is GrantAlytics for?

Nonprofits with 5+ active grants or outside funding sources requiring budget tracking.

- **Have fewer than five grants?** GrantAlytics can still be valuable for organizations that have Federal grants or a grant with multiple phases.

Nonprofits with 2+ grant managers who create budgets, monitor actual spend and report to funding sources.

Nonprofits with 20+ employees working on grants.

Grant managers using spreadsheets for managing grants or an accounting system to determine grant spend vs. budget.

Grant managers spending 8+ hours a week on grant management and reporting tasks.

Frequently Asked Questions

How long does it take to implement?

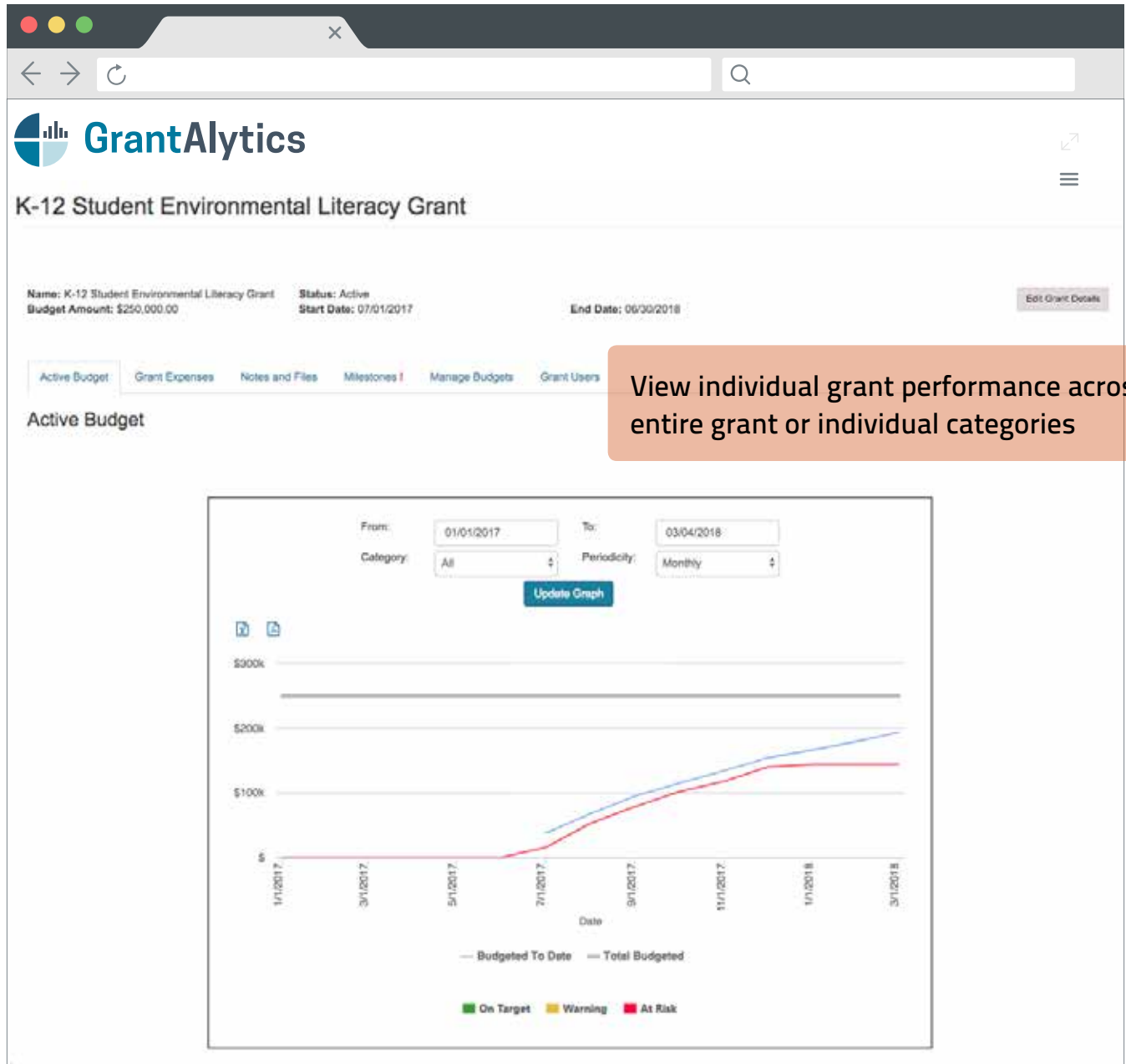- 3– 4 weeks

How long are reports available?

- Indefinitely with the monthly subscription. You can also export grant actuals vs. budget and related information at any time.

Do I need a time & attendance system? Payroll system?

- Many funders require time sheet level detail so for those grants/ programs you must have an automated time-and-attendance software. If your funding sources do not require time sheet level detail, GrantAlytics can use your payroll system's data to populate the actual spend.
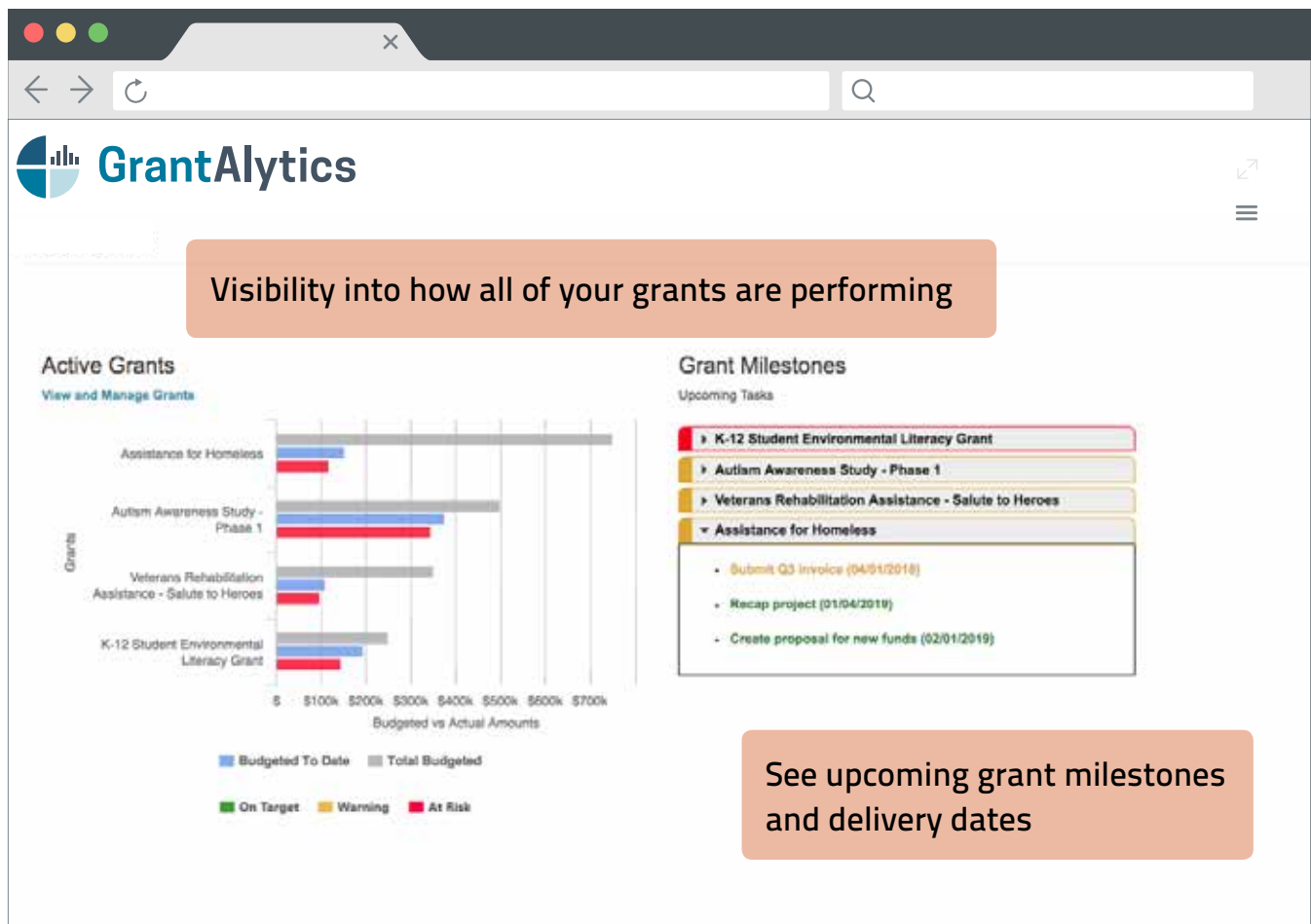
What Does GrantAlytics Reporting Look Like?

Grant compliance for many nonprofits means providing accurate, detailed accounting of time and dollars spent on your grant. Because GrantAlytics works seamlessly with your HCM system, you can get integrated TLM, Payroll, Expenses and Dashboard data quickly so you can have clarity on how grants are performing and why. Best of all, you'll have actual data, not estimates.

View individual grant performance across entire grant or individual categories

Visual display of budget vs. actual by each month and variance amount

What Does GrantAlytics Reporting Look Like?

Armed with accurate data and projections, you will be alerted with color coded performance indicators on the active grant dashboard when overspending or underspending thresholds have been met at the individual grant employee, role, or non-labor expense categories. Executive Directors, CFO Grant Managers and Program Managers will have piece of mind they are prepared for audits with accurate reporting, can course-correct spending with improved visibility, and stay compliant with milestone tracking.

What Does GrantAlytics Reporting Look Like?

GrantAlytics

Autism Awareness Study - Phase 1

Name: Autism Awareness Study - Phase 1   Grant Type: Federal   Funding Source: NIH   Status: Active   [Edit Grant Details]

Budget Amount: $500,000.00   Start Date: 06/01/2017   End Date: 05/28/2018

Active Budget | Grant Expenses | Notes and Files | Milestones | Manage Budgets | Grant Users

Manage Budgets

Create New Budget

Configure budgets by grants using customized categories

Select Budget to Manage: Post award budget (Active) ↕

Budget Name: Post award budget
Budget Status: Active - Read Only
Last Update: Kit Dickinson, 08/20/2017 09:11 AM

Start Date: 06/01/2017
End Date: 05/28/2018
Total Amount: $500,000.00

[Edit Budget Details]

[Activate Budget]
Budget activated on 08/19/2017 by Kit Dickinson.
Activated by Kit Dickinson

[Simulate Budget]
Can't simulate an active budget.

[Delete Budget]
Can't delete active budget.

[Copy to New Draft]

Budget Personnel

Current Total: $500,000.00

Current Total: $500,000.00
Cost-Share Total: $120,000.00

▸ Executive Director	$78,125.00
	Cost-Share: $30,000.00
▸ Hope Solo (Program Leader)	$106,250.00
▸ Larry Bird (Field Study Leader)	$56,250.00
	Cost-Share: $20,000.00
▸ Mia Hamm (Classroom Leader)	$43,750.00
▸ Programmer 1	$62,500.00
	Cost-Share: $25,000.00

Budget Expenses

Direct

▸ Equipment	$50,000.00
	Cost-Share: $15,000.00
▸ Meals	$33,125.00
▸ Travel	$30,000.00
	Cost-Share: $10,000.00

Indirect

| ▸ Training | $40,000.00 |
| | Cost-Share: $20,000.00 |

What Does GrantAlytics Reporting Look Like?

Define duration of each budget category spend

Helping a Disaster-Relief Nonprofit Manage Their Funds

About SBP

SBP was founded in March 2006 following Hurricane Katrina. Their mission is to minimize time between disaster and recovery. During times of disaster when they are at their busiest, SBP has new grants coming in that they must manage.

The Problem

SBP's payroll and grant administrator, Brianna, was managing SBP's 30+ grants on spreadsheets before we met her. She was spending 25-30 hours a week allocating employee hours/earnings to grants, managing budgets, and creating reports to send to Americorps and other funding sources.

The Solution

IDI worked with the HCM team to deliver two IDI solutions to save SBP hours per week:

- IDI's grant/salary allocation solution to automate the allocations of employees' grant worked and non-worked time between time and payroll.

- GrantAlytics, the only grant budgeting and management tool fully integrated with the time and payroll modules.

With these new solutions Brianna can now quickly gain clarity on how each grant is performing and why with actual data from her time and payroll systems, not estimates. GrantAlytics provides SBP the means to take corrective action each pay period, giving them peace of mind and more time to focus on their mission of helping hurricane victims.

> *"GrantAlytics is awesome! I love getting off of spreadsheets! And being able to pull reports by cost number, enter new expenses, and see how things are going against the budget. Plus the dashboard is really convenient and easy to use!"*
>
> - Brianna Audibert, Senior Accountant, SBP, Inc.

How to Get Started With GrantAlytics

We collaborate with our partners for the pre-sales analysis and have a series of industry-specific questions for you to help determine your unique needs. We may also ask for sample files or examples. This will be followed up with an internal technical evaluation to determine the feasibility and scope, which will then be reviewed with you.

To get a pre-evaluation started, call us: 866-846-3226, Option 1, or email us: sales@idesign.com

We can also provide remote help with:

- Setting up grants
- Entering actuals
- Configuring user permissions
- Running reports

Ready to ditch the spreadsheets? Contact IDI to learn more.

Visit our website: idesign.com

Call: 866-846-3226

Email: sales@idesign.com

GrantAlytics is a service developed and supported by IDI, an industry leader in employee data integration solutions for 35+ years. IDI's business is built around enhancing our client's investment in their workforce management systems and extending our partners solutions. Our solutions enable over 30,000+ clients across North America to integrate HR applications and automate business processes.