

RSM Grants Management System

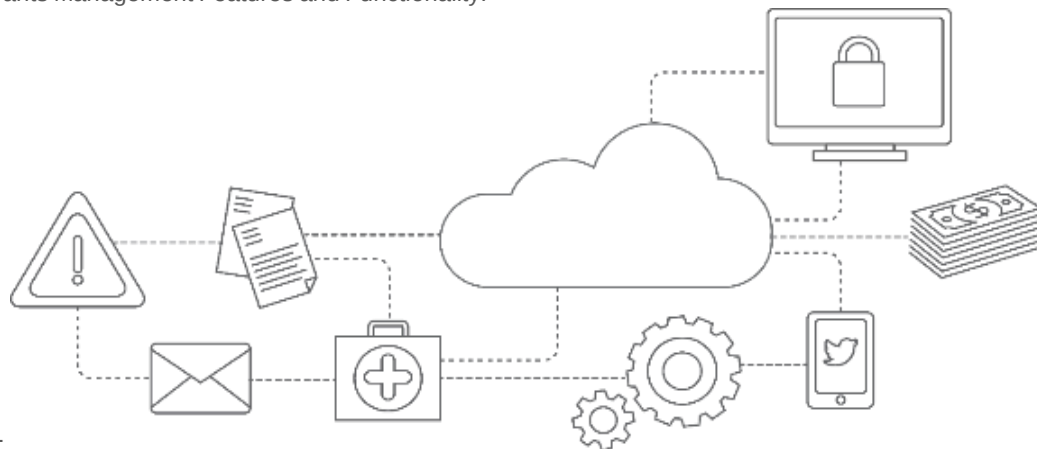
RSM Grants Management System (“RSM GMS”) is a fully featured, customizable database and portal solution to empower organizations in mobilizing resources, managing funding programs, and automating tasks that may be spread across multiple systems or a series of spreadsheets. RSM GMS allows your organization staff to spend time on more value added outreach to donors, partners, grantees, and the community, rather than poring over endless spreadsheets and manually creating reports. Achieve important milestones, transparency, and accountability from the pre-award phase through the post-award phase and monitoring of granted funds.

RSM GMS is a **comprehensive grants management software solution**, built upon Microsoft’s Dynamics 365 Customer Engagement architecture. With native integrations with other back-office platforms such as Microsoft Dynamics GP, Microsoft Dynamics 365 Business Central, and Sage Intacct, GMS seamlessly adapts to the way your organization works. RSM Grants Management System’s portal solution allows a wide **range of self-service scenarios** for an organization’s end users, whether they are donors, grantees, or other important constituents.

The Dynamics 365 Platform allows you to have more than just a grants management solution but a **comprehensive repository of data** for your staff, available anytime, anywhere with the security you can depend on from Microsoft.

Leverage technology that helps you understand and deliver what your donors, grantees, and other constituents really want.

- Proven enterprise class cloud hosting that is feature-rich and secure.
- Access your systems securely anywhere and anytime.
- Grants Management Features and Functionality.



Contact and Company Database

RSM GMS features can **track all data and relationships** for both individuals and companies/organizations that are important to your business processes, including but not limited to: key metrics, nonfinancial statistics, grant donor, grant partner, and grantee activities, event attendance, subscriptions, marketing responses, and constituent engagement. **The flexibility of Dynamics 365** allows you to configure the solution to meet your organization’s needs and allows for efficient enhancements that scales and grows with your organization. Quickly identify the right partners and the right grantees for effective and efficient use of granted funds and achieve your organization’s funding mission with a superior data-driven experience.

Funding and Management of Projects

Through RSM GMS, your organization will gain a single, integrated experience that will make managing and funding projects and grants more efficient. Coordinate complex multi-funder programs or grant projects where there are multiple sources of funding. Deliver program objectives with greater transparency in budgeting, allocation, and monitoring expenditures and project/grant performance. Easily understand expense transactions and leverage new reporting capabilities that allow your organization to better understand and make future decisions for each grant project or program.

Grantee and Sub-Grantee Management

RMS GMS is a robust, relational tool that allows your organization to monitor and measure Grantee and Sub-Grantee recipient performance. Through RSM GMS and Dynamics 365 Customer Engagement, your organization will gain important insights on the hierarchy of parent/child grants or projects and understand to a very granular level whether a partner or grantee or sub-grantee are achieving important performance indicators and the objectives of your organization.

Funding Flow and Reimbursement Activity

RSM GMS will allow your organization to quickly view and manage all components of the Grants process, including the ability to view and manage drawdowns, reimbursements, and disbursements. Your organization users will see, in real time, funds flow across incoming payments, into and out of grants and projects. Taking the manual effort out of grants management, your organization’s staff will be able to automate tracking invoicing, time-based drawdowns, and funding disbursements so that they can focus on more value-added tasks. RSM GMS will allow your organization to make critical data-driven decisions, with the ability to manage contractors’ payments based on actual project performance and generate detailed transaction summaries that will power sophisticated dashboards for leadership and staff to better understand funding activity to make important business process improvements. RSM is dedicated to not just improving your systems, but consulting with your organization on how to improve your business.

Reporting

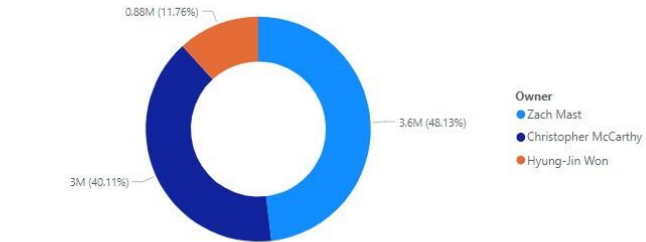
RSM GMS is built with important reporting in mind. We provide ad hoc reporting through Dynamics 365 Customer Engagement as well as a multitude of other pre-written reporting to help your organization track and manage your grants and projects. Your organization will have access to portfolio reports and project reports with customizable sorting and filtering options. We offer customizable reporting periods and robust dashboards and reports that allow your organization to track program and project budgets.

Grants Portal

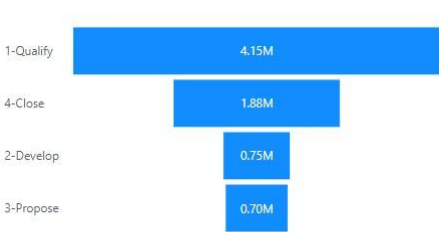
RSM GMS comes with a comprehensive portal that allows your grantees to effectively report program metrics and granted funds usage that will allow your organization to have complete transparency through automated collection of data. Manage project activities and project indicators, track performance by district or organization, and create and perform assessments that your partners, grantees, and constituents can see in real time and interface with your organization directly. RSM GMS Grants Portal allows your organization to easily develop and post grant and contracting opportunities, and allow users to upload any files or grant/program information for your organization. RSM GMS Grants Portal offers features for the entire grants lifecycle, from the planning and development in the pre-award phase, to the awarding of the grant or project and distribution funds, to the support, oversight, and transparency expected during the post-award phase.

OpportunityDashboard
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Amount by Owner

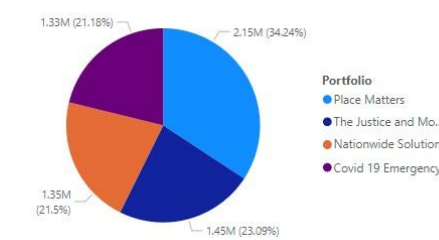


Amount by Step



Name	Value	%	Step	Owner
Covid 19 Federal Funding	1,200,000.00	100	4-Close	Christopher McCarthy
Jackie Southerland - Justice and Mobility	750,000.00	25	2-Develop	Zach Mast
John Smith - Studio funding	680,000.00	90	4-Close	Hyung-Jin Won
Mobility Change Foundation - Justice and Mobility	2,350,000.00	50	1-Qualify	Zach Mast
Potential Nationwide and Place Matters	500,000.00	90	3-Propose	Zach Mast
Prepare for Success - Nationwide Solutions	200,000.00	75	3-Propose	Hyung-Jin Won
Rowling Foundation - Various interest	1,800,000.00	90	1-Qualify	Christopher McCarthy
Total	7,480,000.00			

Amount by Portfolio



Awards and Achievements

RSM GMS has tools and features that allow your partners and grantees to not just receive a notice of award but become a part of your organization's mission and goals. Automated tools allow for effective management of awards in RSM GMS. Recognize your partners and grantees with scoring and assessments as well as notifying them of future funding announcements and other important communications. Effective, automated communication of operational notifications allows staff to engage with your organization constituents on a more personal level by freeing up critical time from performing repetitive, lower value interactions.



Financial Reporting and Integration

RSM GMS offers flexibility and depth in financial reporting and/or integration as desired by your organization. We can provide the ability to import Excel reports from your financial system, export grant related transactions into your financial systems, and provide a mapping of transaction data and posting to the appropriate grant and budget category. Through RSM GMS, your finance/accounting team is an active stakeholder in our system, with features such as the ability to copy budgets and budget templates, manage program income and supplements, determine source allocation by funder, track and manage expenditures, manage grantee and sub-grantee invoicing, determine performance based payments, track direct, cash match, and in-kind funding, process planned/obligated/actual transactions, and manage and report against drawdowns, disbursements, and reimbursements. We integrate with a variety of finance/accounting software including, but not limited to, Microsoft Dynamics GP, Microsoft Dynamics 365 Business Central, and Sage Intacct.

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