GROSSMONT-CUYAMACA
COMMUNITY COLLEGE DISTRICT

Name_____

Functionality	Comments
Pre-Award (Research and Sponsored Programs)	
1. If your system does not provide pre-award capabilities, do you have partners whose systems can interface easily (with minimal programming) with yours?	
a) Tell us who your partners are.	
b) Demonstrate when you will incorporate your partner(s) into this process?	
2. Demonstrate ability to generate grant proposal(s) on standard federal agency forms such as the SF-424 and/or Budget Form(s).	
3. Demonstrate how your system will use data and information from past applications to build new grant applications.	
4. Demonstrate what data and information from prior projects will be retained in the system.	
5. Demonstrate the ability to submit grant proposals to grants.gov S2S (System to System):	
a) Does the system allow you to view and select proposal opportunities and specific RFPs from grants.gov? If so, by which fields, Agency, CFDA, Program #, etc. If yes, how often is the system updated to reflect changes?	
b) Does it allow you to use sponsor templates?	
6. Does the system allow for input/access district-wide based upon role?	

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7. Demonstrate your electronic library capability and how it is organized.	
8. Demonstrate how the system allows for staff to upload materials such as: CVs, bio-sketches and current and pending support.	
9. Demonstrate the ability to upload files from external programs (document attachment) such as Word processing software, Adobe PDF, etc…	
10. Demonstrate the ease and ability of your system to generate grant proposal budgets and track changes in the following:	
a) Does the system allow you to import budgets from excel? Does the system allow you to export budgets into excel or PDF?	
b) Does the system allow for the proposed budget to be exported into the Post Award system without retyping the numbers?	
c) Can we incorporate our object codes into the system to create the Post Award budget after the proposal is funded?	
d) Does the system allow you to prepare National institute for Health (NIH) modular proposal budgets?	
11. Demonstrate how your system allows users to create, simulate and select budget data from the budget management module to produce multiple variances for salaries and benefits.	
12. Demonstrate how salary and benefit budget data can be selected for specific individuals and automatically populate grant budget worksheets.	
13. Show us how the system maintains cost sharing information:	

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Functionality	Comments
a) Demonstrate how the system tracks, maintains, and applies cost sharing and leverage expense information and show how this information, (salaries, benefits, facilities, etc…), shifts from Pre-award to Post-award.	
14. Demonstrate how the system captures data, calculations or formulas to determine in-kind contributions.	
15. Demonstrate how HR and payroll data, (e.g., primary departments and job codes) are loaded into your *pre-award system* for use in proposal preparation.	
16. Demonstrate the ability to track modifications, supplements, and/or competing continuations to current proposals:	
a) Can the system record changes (budget, scope, dates, sponsor's award number, sponsor's contact and billing information, key personnel changes) and maintain the history of the original proposal as submitted across fiscal years.	
17. Demonstrate how the system will allow us to define our own proposal identification numbers.	
18. Demonstrate ability to track grant proposals by status (submitted, pending, and funded) on an annual basis, and inception to date.	
19. Demonstrate ability to track IRB/IACUC/Bio Safety/COI applications and renewals, training:	
a) Does the system allow for prompts to applicants when IRB/IACUC approvals are nearing expiration?	

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b) Does the system allow applicants to upload their protocols electronically?	
20. Generate a proposal workflow/approval process, to include reminder notifications, change notifications, updates to grant amounts:	
a) Show how we can we set up approval mechanisms that allow for simultaneous approvals and designate alternatives?	
21. Demonstrate the ability to track contractual agreements (contracts) and the workflow in place for review and approval by multiple offices (Academic Departments, Research and Sponsored Programs, Post-Award, Legal, Risk Management, etc.):	
a) Does the system allow for the capture and documentation of negotiation and communication details?	
22. Show how the system allows us to establish pre-award (90 day) accounts with date and dollar limits.	
23. Demonstrate how awards are tracked, (i.e. awarded or denied).	
Post-Award (Financial Services)	
1. Demonstrate how pre-award to post-award process functions including all forms and budget data.	
2. Demonstrate ability to create award and sub-award budgets:	

Name_____

Functionality	Comments
a) Demonstrate how to transition pre-award gross budgets into line item detailed post-award budgets.	
b) Demonstrate how line items for contracted services can be tracked by activity type for sub-awardees, (i.e. materials, salaries, etc…)	
3. Demonstrate the ability to track modifications, supplements, and/or competing continuations to current awards:	
a) Grant history.	
4. Demonstrate ability to generate invoices – including inception-to-date totals invoiced and received:	
a) Demonstrate the ability generate invoice based on expenditures period (i.e., 07/01/12 – 09/30/12).	
b) Demonstrate the ability to cross fiscal years.	
c) Demonstrate how invoices include payments received and outstanding amounts due by line item.	
d) Demonstrate how your system will track sub-contractor activities and how that data will be imported when we are a lead on a grant with multiple sub-contractors.	
5. Demonstrate how your system will track sub-contractor activities and how that data will be reported when we are a lead on a grant with multiple sub-contractors.	
6. Demonstrate ability to generate reminder notices to PIs when progress reports are due:	
a) Ability to input due dates when budget submitted.	

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Functionality	Comments
b) Auto notify of due dates.	
7. Demonstrate Effort Certification (grant deliverables) both for percentage and dollar amounts.	
8. Demonstrate projection reports:	
a) Demonstrate "tracking at-a-glance" capabilities to pull various grants or groups of grants and budgets to display expenditures, balances, and variances.	
b) Demonstrate how your system alerts when maximum percentage amounts are different from approved budget variances.	
9. Demonstrate how local project income generated can be tied to the project budget codes including being distributed into expense object lines and tracked.	
10. Demonstrate inception-to-date and year-to-date financial reports for grants:	
a) Demonstrate how your system can send monthly/quarterly/bi-annual reports or warnings regarding under or over expenditure of grants funds specific to line items and/or object codes.	
b) Generate reports that cross fiscal years.	
11. Show us what user defined fields are available for grant agency reporting and coding.	
12. Demonstrate how your system provides for user defined tracking and reporting.	

Session 8: Grants Accounting
February 5, 2014
Workday

Name_____

Functionality	Comments
13. Demonstrate how your system calculates claimable indirect costs.	
14. Demonstrate how your system tracks grant restrictions and rules by award.	

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Evaluation Form
Name of Evaluator:
Perceived Strengths:
Perceived Weaknesses:
Additional Comments:
Acceptability of Vendor Solution: ___ Yes   ___ No