

PR: Alignment

September 25, 2018

Agenda

- Project Objectives
- Project Alignment
- Account Information
- Use Cases
 - Overview
 - Use Case 1, 2, and 3
- Use Case Functionality
 - Overview
 - Use Case 1, 2, and 3
- Use Case 1 Training Plan

Project Objectives

The overall objectives of this project are to implement the AmpliFund solution in Puerto Rico to achieve the following:

- Increase revenue to the Island through a standardized process that involves both the Federal Funds Office and the respective Agencies
- Effectively manage already awarded grants to maximize drawdown and accountability at the state and sub recipient levels
- Ensure Federal compliance with Uniform Grant Guidance and related Fiscal Control Board
- Improve business processes through Grants Management expert consulting
- Provide visibility and insight into award management

Project Alignment



Account Information

Overview

Account Information

Account Type	Functionality Areas	Support Level	Description
COF / OGP	All Functionality	Grants Management Support Training Support Technical Support	Central Government of Puerto Rico oversight account. Have the ability to request new accounts and has access to every feature and function of the system.
Agencies	All Functionality	Grants Management Support Training Support Technical Support	<p>Selected by the Central Government of Puerto Rico. Has access to every feature and function of the system including the ability to manage recipient of their funds.</p> <p>Includes all Agencies within the Central Government. Year one of the project involves the implementation and support of five selected agencies.</p>
Recipients	Recipient License Grants Explorer	Training Support Technical Support	Selected by the Central Government of Puerto Rico through specific Agencies. Only have the ability to manage dollars awarded to them through the Central Government / Agencies. Do have access to Grants Explorer (Research).
NGOs, Recipients, Additional Entities	Grants Explorer	Technical Support	<p>Selected by the Central Government of Puerto Rico to have access to Grants Explorer (Research). May during later Use Cases transition to a Recipient with expanded functionality.</p> <p>These additional entities can receive a research license only at the designation of Central Government.</p>

Account Information

Internal Document:

Overview: Central Government of Puerto Rico

AmpliFund License, Support, and Hierarchy Guideline

Use Cases

Use Case Overview

Use Case Overview

Use Case	Description
Use Case 1: Research and Pre-Award	Identify Federal Funds for Puerto Rico with advanced research and targeting capabilities, and then track and coordinate pending Federal Funds submissions from multiple agreed agencies/departments in a secure, centralized location.
Use Case 2: “New Money” Post-Award Management	Includes Pre-Award - Manages the entire Grant lifecycle, from research to post-award sub-recipient reporting, in a centralized hub. Meets federal regulation requirements and ensures that compliances and goals are met for UGG, Data Act and Treasury "Do Not Pay" Initiative. Tracking and reporting capabilities with visibility into how funds enter and are expended.
Use Case 3: “Old Money” Post-Award Management	Includes Pre-Award - Manages the entire Grant lifecycle, from research to post-award sub-recipient reporting, in a centralized hub. Meet federal regulation requirements and ensures compliance and goals are met for UGG, Data Act and Treasury "Do Not Pay" Initiative. Tracking and reporting capabilities with visibility into how funds enter and are expended. Considers integration to do data migration of information regarding existing loans.

Use Case 1

Account Specific Functionality and Agenda

Use Case 1 Overview

Account Type	Use Case Scenarios and Expectations
COF / OGP	<ul style="list-style-type: none">• Has access to every feature and function of the system• Will be trained on different features specific to the selected Account types (Ex: Agency vs NGO)• Will understand requirements gathering needs for each Account type per Use Case• Will help define overall business processes and workflows related to Use Case 1• Pre-Award functionality includes, but is not limited to, the processes of Researching new opportunities, working in a collaborative environment to pursue new opportunities, creating and managing related records within AmpliFund• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk

Use Case 1 Overview

Account Type	Use Case Scenario Expectations
Agencies	<ul style="list-style-type: none">• Has access to every feature and function of the system• Will abide by overall business processes defined by COF / OGP• Will participate in requirements gathering sessions related to Use Case 1• Will help define Agency-specific business processes and workflows related to Use Case 1• Pre-Award functionality includes, but is not limited to, the processes of Researching new opportunities, working in a collaborative environment to pursue new opportunities, creating and managing related records within AmpliFund• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk• Will be trained on all Pre-Award functionality with business process discussions related to best use of available functionality

Use Case 1 Overview

Account Type	Use Case Scenario Expectations
Recipients	<ul style="list-style-type: none">• Limited Scope Functionality within Use Case 1• Research and Knowledge Center Module Access only• These accounts are able to search for new opportunities using the Grants Explorer• Selected organizations will be chosen for an expanded training session through the NGO Workshop Kick-Off in late September• Later Agencies will request access to Grants Explorer through the Funds Management website• Training and reference material will be available through the Funds Management Help Desk
NGOs, Recipients, Additional Entities	<ul style="list-style-type: none">• Full Scope Functionality available within Use Case 1• Research and Knowledge Center Module Access only• These accounts are able to search for new opportunities using the Grants Explorer• Selected organizations will be chosen for an expanded training session through the NGO Workshop Kick-Off in late September• Later Agencies will request access to Grants Explorer through the Funds Management website• Training and reference material will be available through the Funds Management Help Desk

Use Case 2

Account Specific Functionality and Agenda

Use Case 2 Overview

Account Type	Use Case Scenarios and Expectations
COF / OGP	<ul style="list-style-type: none">• Has access to every feature and function of the system• Will be trained on different features specific to the selected Account types (Ex: Agency vs Recipient)• Will understand requirements gathering needs for each Account type per Use Case• Will help define overall business processes and workflows related to Use Case 2• Post-Award functionality includes, but is not limited to, the grant creation, creating and tracking against performance plans and budgets, managing reporting periods and payment requests, recipient management, project module, and workflow• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk

Use Case 2 Overview

Account Type	Use Case Scenario Expectations
Agencies	<ul style="list-style-type: none">• Has access to every feature and function of the system• Will abide by overall business processes defined by COF / OGP• Will participate in requirements gathering sessions related to Use Case 1• Will help define Agency-specific business processes and workflows related to Use Case 1• Post-Award functionality includes, but is not limited to, the grant creation, creating and tracking against performance plans and budgets, managing reporting periods and payment requests, recipient management, project module, and workflow• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk• Will be trained on all Post-Award functionality with business process discussions related to best use of available functionality

Use Case 2 Overview

Account Type	Use Case Scenario Expectations
Recipients	<ul style="list-style-type: none">• Full Scope Functionality within Use Case 2• Recipient Access, Research, and Knowledge Center, and (full) Administration• Training will be provided by Implementation team comparable to current AF practices• Reference material will be available through the Funds Management Help Desk <p>New Scenarios:</p> <ul style="list-style-type: none">• Some Recipients may begin within Use Case 1 and need to be converted from a Grants Explorer client to a Recipient license (with Research and Knowledge Center)• Some Recipients may be receiving funds from more than one Agency• Some Recipients may be both leads and subs
NGOs, Recipients, Additional Entities	<ul style="list-style-type: none">• No change from Use Case 1• Recipients still may be added as Grants Explorer clients prior to becoming Recipients by an Agency

Use Case 3

Account Specific Functionality and Agenda

Use Case 3 Overview

Account Type	Use Case Scenarios and Expectations
COF / OGP	<ul style="list-style-type: none">• No functionality change from Use Cases 1 & 2• Data Collection for all active grants and legacy data<ul style="list-style-type: none">• Legacy data parameters to be determined by COF / OGP• Has access to every feature and function of the system• Will understand requirements gathering needs for Agencies• Will help define overall business processes and workflows related to Use Case 3• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk

Use Case 3 Overview

Account Type	Use Case Scenario Expectations
Agencies	<ul style="list-style-type: none">• No functionality change from Use Cases 1 & 2• Data Collection for all active grants and legacy data (parameters TBD)• Has access to every feature and function of the system• Will abide by overall business processes defined by COF / OGP• Will participate in requirements gathering sessions related to Use Case 3• Will help define Agency-specific business processes and workflows related to Use Case 3• Training sessions will be interactive and cover system functionality in conjunction with business process discussions• Training and reference material and support will be available through the Funds Management Help Desk

Use Case 3 Overview

Account Type	Use Case Scenario Expectations
Recipients	<ul style="list-style-type: none"> • No functionality change from Use Cases 1 & 2 <ul style="list-style-type: none"> • Large potential for new Recipients to be onboarded • Data Collection for all active recipients and legacy data (parameters TBD) • Full Scope Functionality within Use Case 2 • Recipient Access, Research, and Knowledge Center, and (full) Administration • Training will be provided by Implementation team comparable to current AF practices • Reference material will be available through the Funds Management Help Desk New Scenarios: <ul style="list-style-type: none"> • Some Recipients may begin within Use Case 1 and need to be converted from a Grants Explorer client to a Recipient license (with Research and Knowledge Center) • Some Recipients may be receiving funds from more than one Agency • Some Recipients may be both leads and subs
NGOs, Recipients, Additional Entities	<ul style="list-style-type: none"> • No change from Use Case 1 • Recipients still may be added as Grants Explorer clients prior to becoming Recipients by an Agency

Use Case Functionality

Internal Document:

AmpliFund Functionality Use Case Worksheet

Use Case 1 Training Plan

Use Case 1: Agency Training Sessions Overview

Training Session	Description
Requirements Gathering / Master Data	Initial Requirements Gathering Sessions/s. Introduce AmpliFund master data elements, import template review, and entry methods including manual entry and import process.
Grant Management Landscape (GML)	Reviewing client current grants management process. Introduction of existing GML to help identify appropriate use of system functionality. Discussion of issues and challenges do you faced in your current process.
Introduction to AmpliFund and Research	Overview of AmpliFund functionality and concepts, navigational elements, Support, Research and Knowledge Center.
Contacts and Administration	Organization, Individual and Staff record management, and Administration including User security roles and data element lists.
Grants Overview	Covers creation of Grant record including Grant Details and Tools. Demonstrates connection between Grants and the Activity section. Instructs how to create and save configurable Views.
Business Process Discussion/s	Recaps functionality with the additional layers of putting functionality into practice. Will be discussed holistically with all aspects of PR Grants Management Solution.

Sessions vary between 60-90 minutes with in person or online options.

Use Case 1: Agency Training Sessions Overview

Training Session	Description
Performance Plan Creation	Covers Pre-Award Performance Planning. Includes the creation of Performance Plans with Goals and Strategies. Introduces concepts that will be important for Use Case 2 and 3 including achievement entry and reporting.
Budget Creation	Overview of Pre-Award Budget processes. Includes configuring Budget Settings and grant budget creation including building out Categories, Line Items, and associated functionality. Introduces concepts that will be important for Use Case 2 and 3 including expense entry and reporting.
Business Process Discussion/s	Recaps functionality with the additional layers of putting functionality into practice. Will be discussed holistically with all aspects of PR Grants Management Solution.
Workflow Session/s	Overview of Workflow functionality, identify and design specific workflows to be within the system. Goals include documenting and automating identified business processes.
Administrative Rollout	Overview of additional data preparation suggestions including a focus on available import process within the system including mass imports and user creation and invitations.
Q&A Sessions	Open session(s) for any client questions and additional review

Sessions vary between 60-90 minutes with in person or online options.