



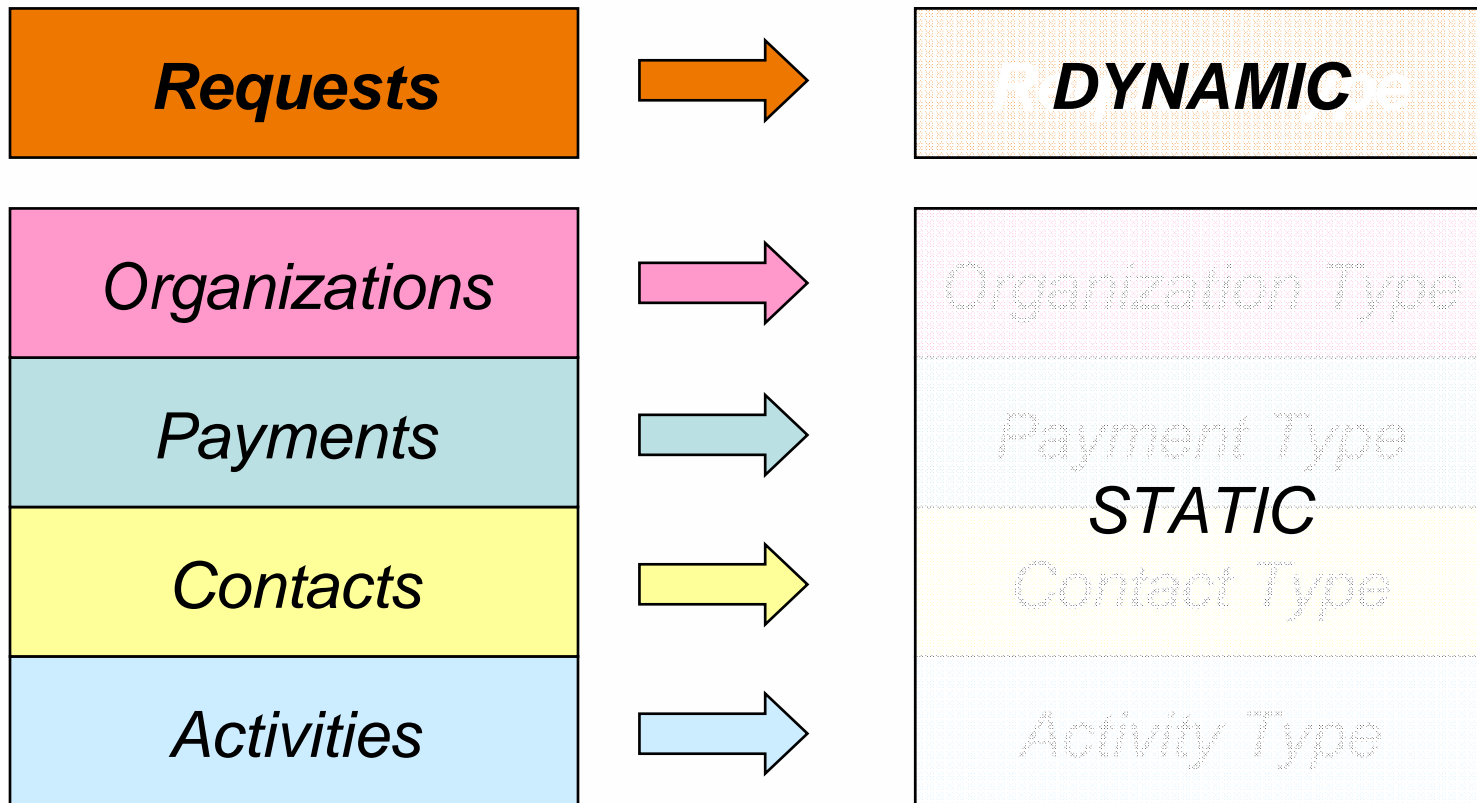
Reconsidering Request Types

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Agenda

- Request Types defined
- Areas of Impact
- Design considerations
- Design on the fly...

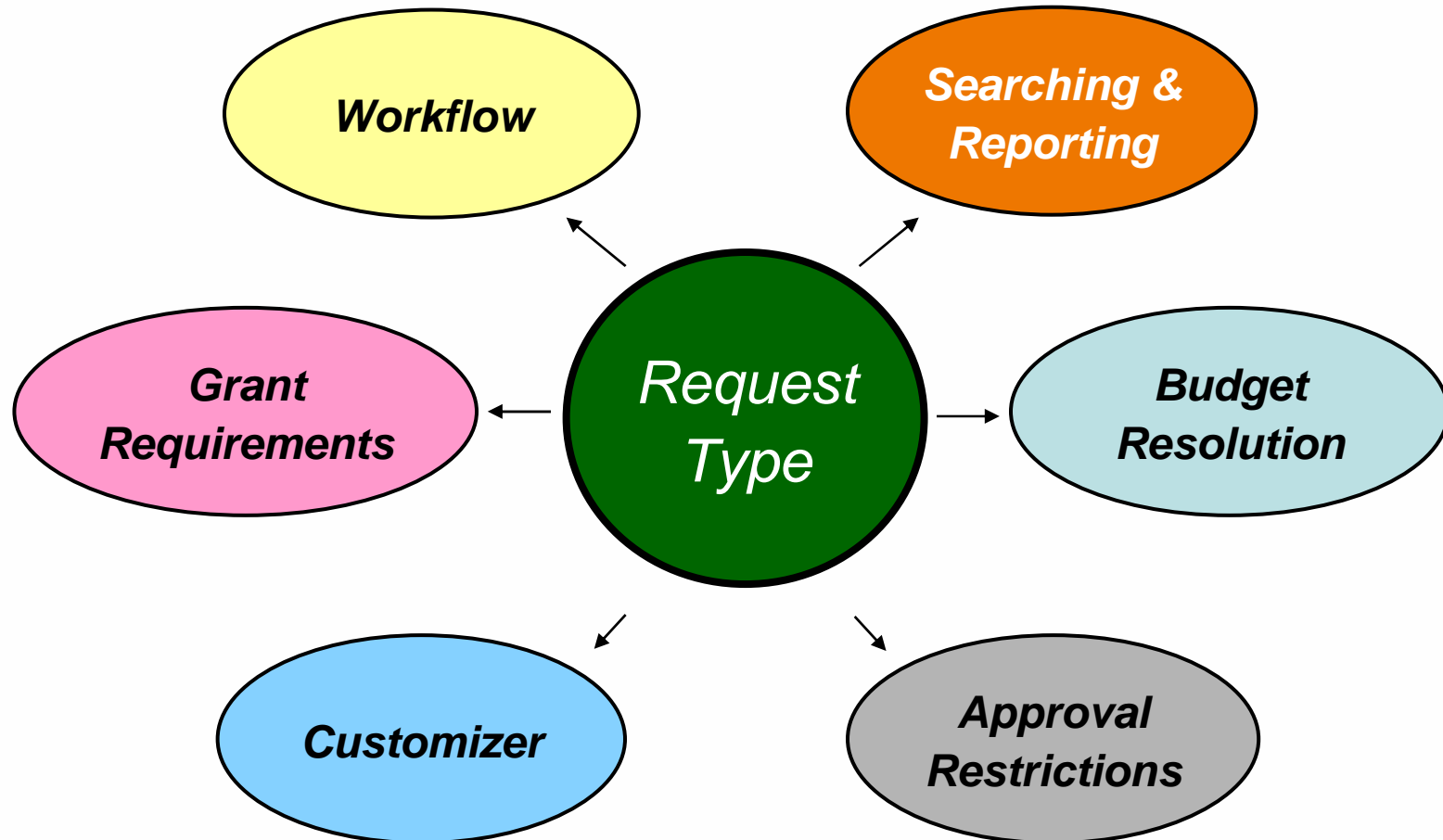
What's in a Type?



What Makes a Request Type Dynamic?

- Request Type **impacts** 6 key areas of GIFTS
- Design them effectively and you create a system that's:
 - Flexible
 - Scalable
 - Practical
 - Intuitive
- Design them ineffectively, and you limit the capabilities of a powerful grantmaking system

Areas of Impact

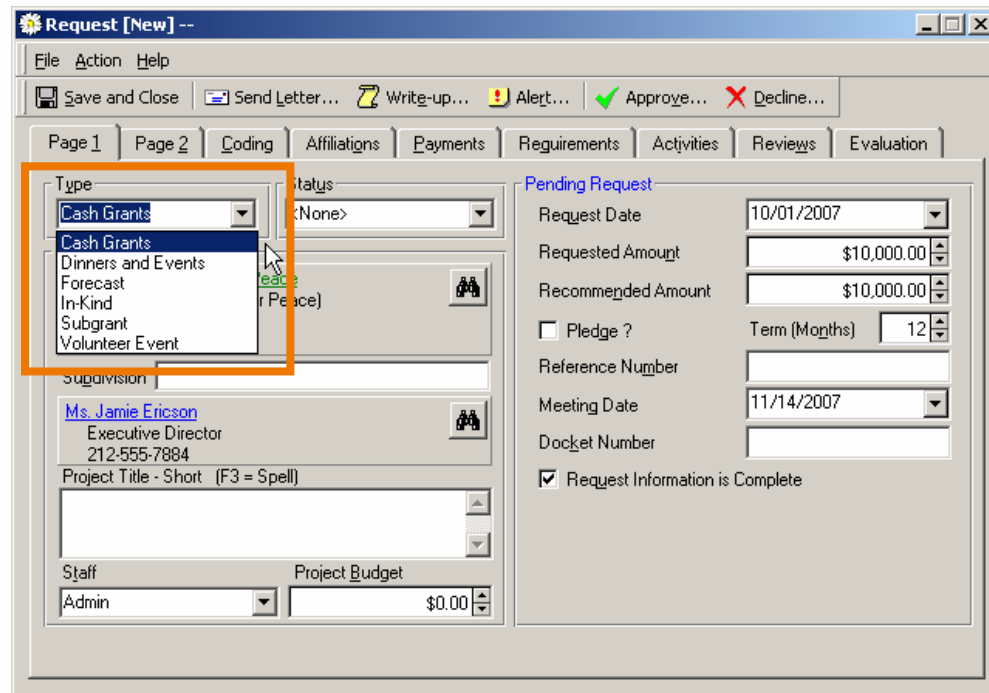


Design Considerations

- **Workflow**
 - Assign Status Codes by Request Type
- **Searching and Reporting**
 - Use Quick Find to search by Request Type
 - Run Standard Reports grouped by Request Type
- **Budget Resolution**
 - Determine if resolution is required by Request Type
- **Customizer**
 - Create custom screens (tabs) by Request Type
- **Grant Requirements**
 - Create Grant Requirements automatically by Request Type
- **Approval Restrictions**
 - Create Approval Restrictions by Request Type

It All Starts With Request Type

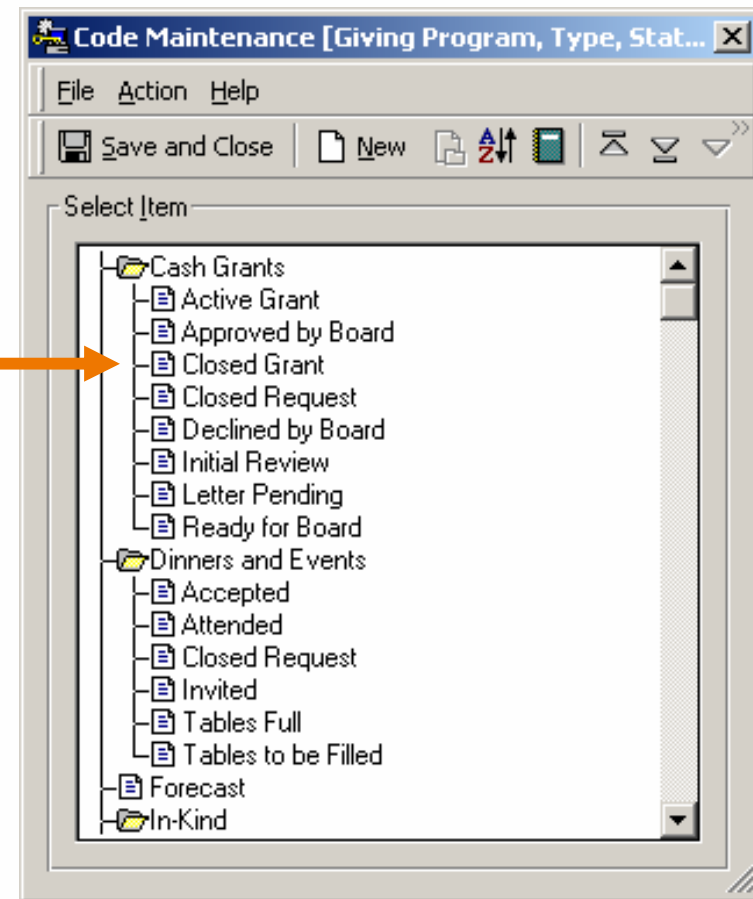
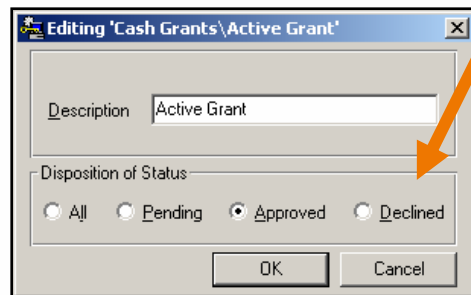
- It's the FIRST field entered on a Request
- It's one of only two fields required to save a Request (Request Date is the other)



Everything Starts with Request Type

Managing Workflow with Status Codes

- Status Codes are assigned by Request Type
- Distinct processes can therefore be modeled by Request Type
- Status Codes can also depend on Disposition



Configure Status Codes by Request Type

Searching and Reporting

- **Searching:** Request Type is an important search criteria

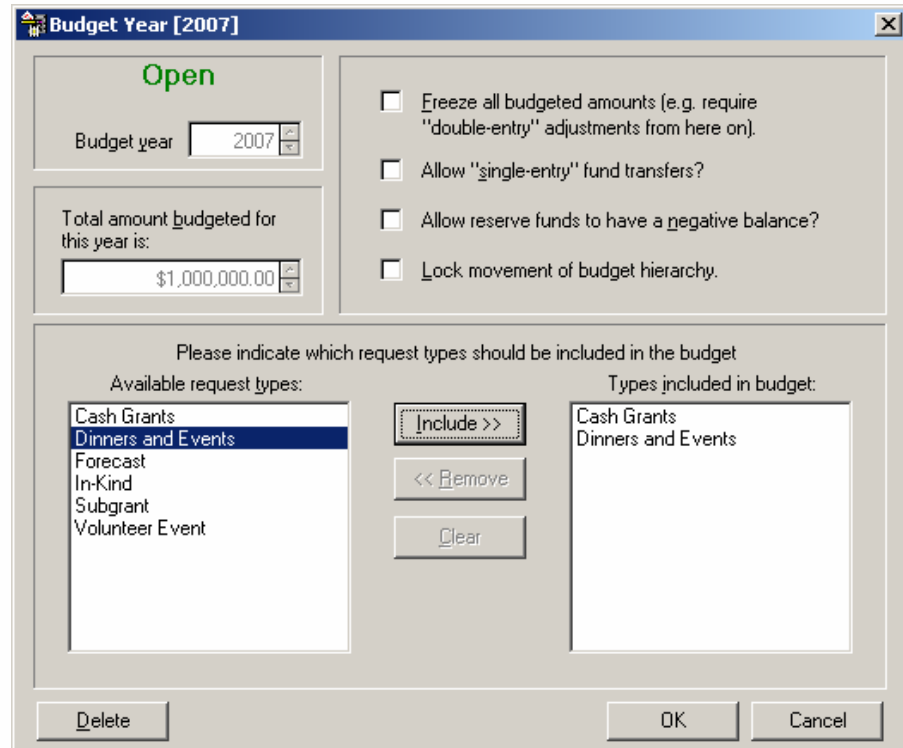
Choose search criteria

<input checked="" type="radio"/> Approval Date	<input type="radio"/> Meeting Date	<input type="radio"/> Reference Number
<input type="radio"/> Branch	<input type="radio"/> Organization's City	<input type="radio"/> Renewal Date
<input type="radio"/> Coding Sheet	<input type="radio"/> Organization's Country	<input type="radio"/> Request Amount
<input type="radio"/> Declination Date	<input type="radio"/> Organization's Name	<input type="radio"/> Request Date
<input type="radio"/> Declination Reason	<input type="radio"/> Organization's State	<input type="radio"/> Request ID
<input type="radio"/> Disposition	<input type="radio"/> Primary Contact's Last Name	<input type="radio"/> Request is Incomplete
<input type="radio"/> Docket Number	<input type="radio"/> Project End Date	<input type="radio"/> Request Type and Status
<input type="radio"/> Grant Amount	<input type="radio"/> Project Start Date	<input type="radio"/> Staff
<input type="radio"/> Grant Balance	<input type="radio"/> Project Title	<input type="radio"/> Subdivision
<input type="radio"/> Grants with Unscheduled Balances	<input type="radio"/> Recommended Amount	<input type="radio"/> Term (Months)

- **Reporting:** Several Standard Reports group by Request Type
 - Declinations – Alpha Listing, by Grant Type
 - Grants – Alpha List, by Grant Type
 - Grants – Chronological Listing, by Grant Type
 - Proposals – Alpha List by Grant Request Type
 - Summary of Requests by Type, Disposition, and Status

Budget Resolution

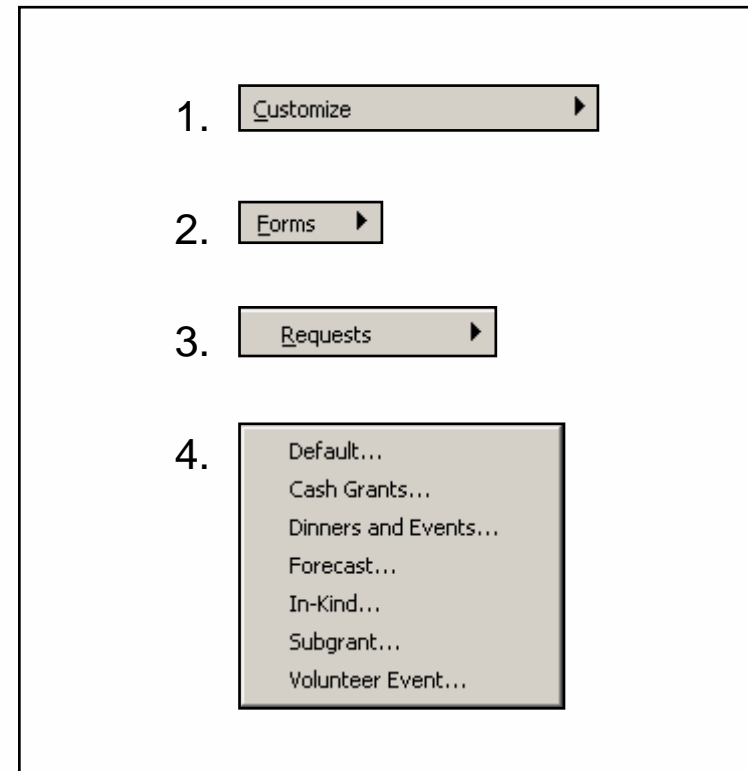
- Request Type determines whether budget resolution is required
- Include Request Types relevant for budgeting, such as:
 - Cash Grants
 - Dinners and Events
- Some grantmakers also budget In-Kind, such as:
 - Product
 - Shipping



Choose Request Types for Budgeting

Customizer

- Create custom request screens by Request Type
- Simplify form design and development
- Clearly distinguish data entry requirements
- Create a more intuitive system

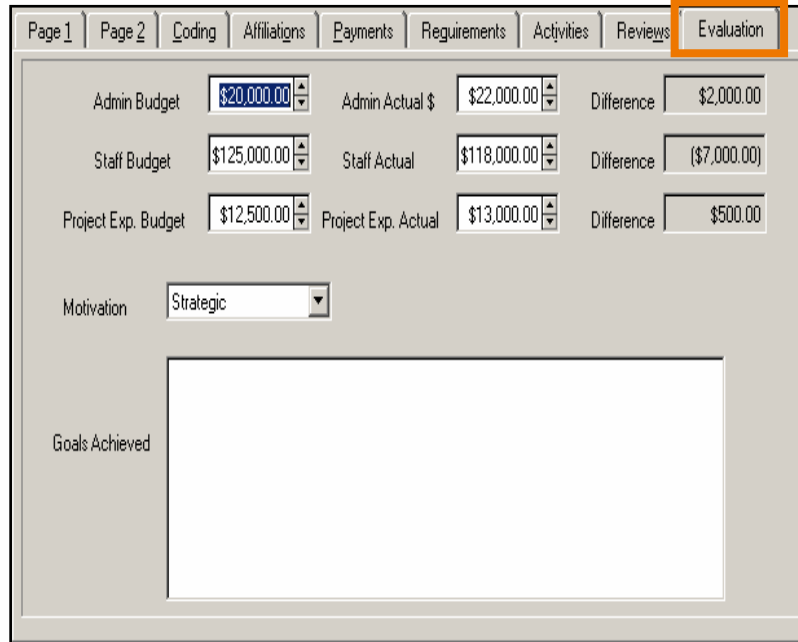


Menu Path to Request Form Design

Custom Screens by Request Type

*Request Type =
Cash Grants*

*Request Type =
Dinners and Events*

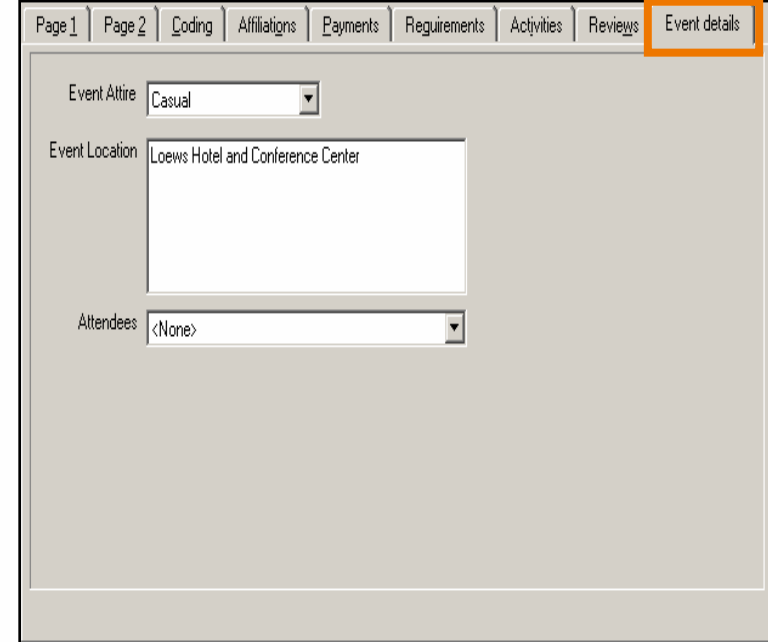


Category	Budget	Actual	Difference
Admin Budget	\$20,000.00	\$22,000.00	\$2,000.00
Staff Budget	\$125,000.00	\$118,000.00	(\$7,000.00)
Project Exp. Budget	\$12,500.00	\$13,000.00	\$500.00

Motivation: Strategic

Goals Achieved: [Empty text area]

Evaluation Screen



Event Attire: Casual

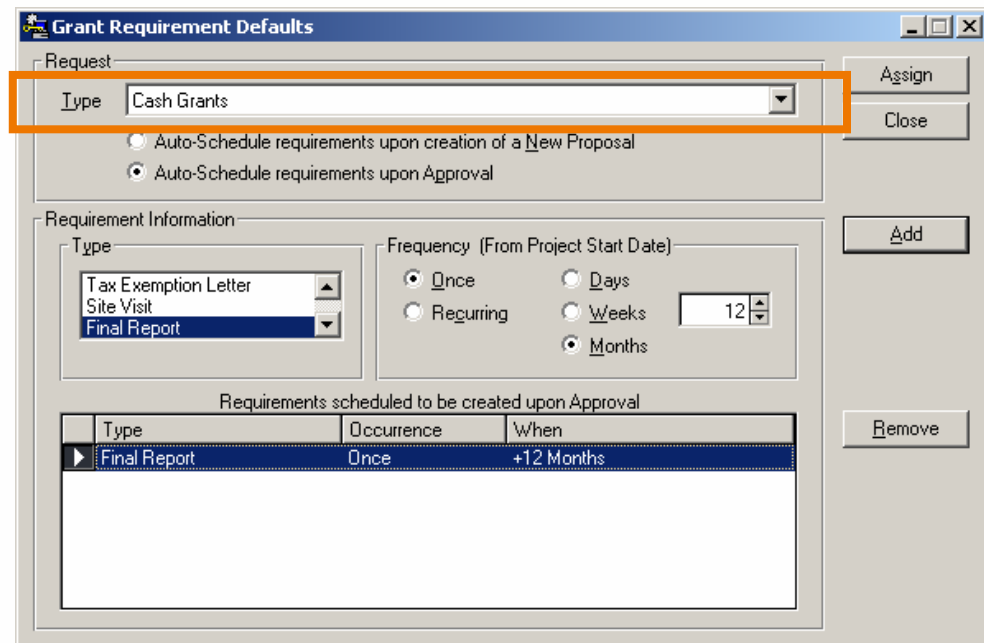
Event Location: Loews Hotel and Conference Center

Attendees: <None>

Event Details Screen

Grant Requirements

- Default Grant Requirements can be created based on Request Type
- Schedule them based on Request entry or approval
- Set them in the Admin Module



Grant Requirement Defaults

Request

Type: Cash Grants

Auto-Schedule requirements upon creation of a New Proposal
 Auto-Schedule requirements upon Approval

Requirement Information

Type: Tax Exemption Letter, Site Visit, Final Report

Frequency (From Project Start Date):

 Once

 Days

 Recurring

 Weeks

 Months

When: 12

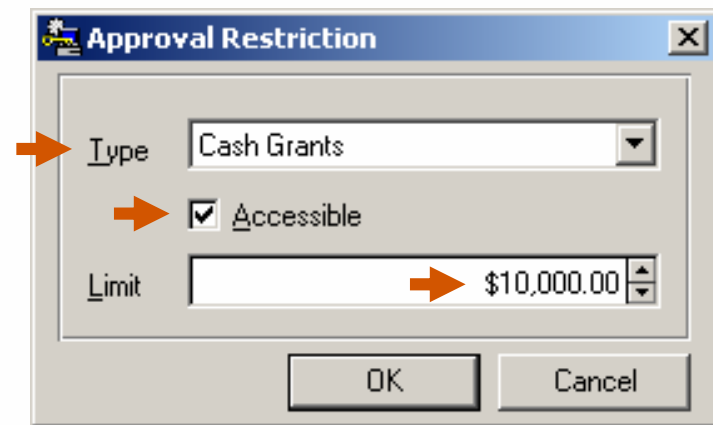
Requirements scheduled to be created upon Approval

Type	Occurrence	When
Final Report	Once	+12 Months

Auto-Schedule Grant Requirements

Approval Restrictions

- Assigned by Group
- Can be created for each Request Type
- Can limit ability to approve Requests above a certain Limit
- Can limit ability to approve Requests entirely



Set Approval Restriction

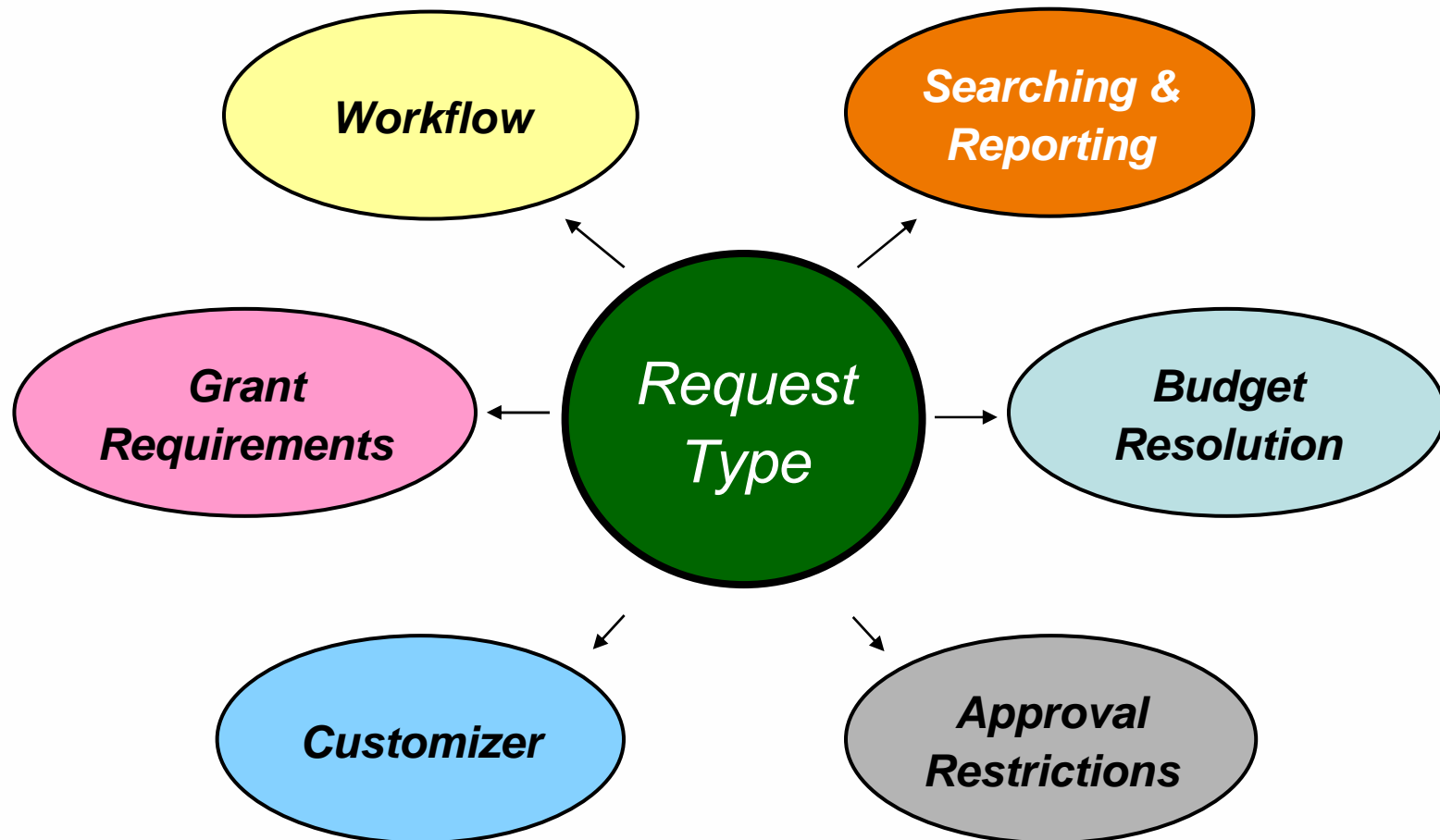
Approval Restriction Options

If the Option is...	Users in that Group Cannot...
No Access	<ol style="list-style-type: none"> 1. Add, Approve, or Modify the Payment Schedule for a Request of that Type 2. Change the Type of existing Requests from that Type another, or vice versa
Limited Access	<ol style="list-style-type: none"> 1. Approve a grant over the limited amount 2. Modify Payments so that the grant amount is exceeded 3. Change a grant's Type to the limited Type if the grant amount exceeds the new Type's limit

“Out-of-the-Box” Request Types

- Subgrants
- Pipeline (forecasting)
- Super-status
- Volunteer Events

Areas of Impact





For more information, contact:

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