

Major Development Factors to Consider-Appendix 1

Grant Programs/Easement

The grant management process consists of three phases: application, active grants/life-cycle administration, and easements. NJHT staff should be able to navigate back and forth between the grants screen and easement screen.

The Grant Section will contain approximately 120 fields.

The Easement Section will contain approximately 20 fields.

- Designed to handle several different grant programs; including but not limited to Preserve New Jersey and 1772
- Designed to mimic the NJHT's current business process via D365 application workflow tracking and reporting from application through the closeout process
- Ability to manage workflow tools including ability to create and save reports, track and log correspondence, set reminders, etc.
- Must be able to track approximately 35 different type of supporting documents ex: jpeg, email, notes etc.
- Import all data contained within current access database via CSV and Excel files
- Ability to export data into a usable format at any time in the future if needed
- Ability to automatically generate or mail merge correspondence and documents to grantees such as contracts, award letters, reporting reminders etc
- Ability for users to create custom reports based on various criteria including, but not limited to:
 - grant type
 - name
 - amount awarded
 - reimbursement amount and date
 - percentage drawn down, and remaining balance
 - organization
 - county
 - district
 - audit required

Accessibility

It is essential that the application is capable of being accessed through D365 and a web portal. NJHT staff, applicants, and external reviewers must be able to access and monitor the application and its processes.

- Dynamics 365

- Online application and outside evaluation capability

Web Portal

- The Web Portal section will contain approximately 120 fields
- The capability of allowing outside reviewers the ability to access and score applications, integrating them with NJHT staff scores and create a ranking based on the combined score
- Applicant ability to create a username and password to access the portal
- Ability to submit any required documents such as: Scope of Work, construction documents pic, etc. as requested by NJHT staff, in a variety of formats (pdf, excel, doc, etc.)
- Ability to correspond electronically with NJHT staff
- A checklist identifying submitted/unsubmitted documents by applicant
- Ability to easily print all or individual sections of the application
- Ability to generate automatic reminders generated on certain dates and deadlines in database and add important dates to NJHT staff calendars
- Ability to save commonly run reports and create new reports as needed

Financial Management

A key component of the database will encompass the ability to track grant funding, payments, remittances, and accounting sources.

- Ability to create a Treasurer's Report which consists of the following data:
 - Active grants sorted by year and account number, with 10-15 data points
 - Grant fund status. For each grant program, a list of open grants, how much has been paid for each, and how much is remaining
 - Paid Report. This includes a list of payments made within a specified timeframe, capable of being sorted by open or closed, then listed by project number
 - Total amount paid and number of payments at the end of each category, including a grand total
- Ability to record and track returned funds as remittance