

Key Benefits

A solution that transforms the way organizations manage grants, enabling them to handle complex financial tracking and reporting with ease:

- **Improved Efficiency:** administer agreements and budgets with ease.
- **Fewer Errors:** process automation and wizard-based tools.
- **Streamlined Collaboration:** real-time visibility into expenditures and forecasts.
- **Faster Payments:** vendors can submit claims more quickly.
- **Informed Decision-Making:** insight into financial performance, data-driven decisions.

A Modular Solution

Our Grant Tracking Solution is part of a suite of modules built for municipal and county government.

Implementing multiple modules can lead to incredible efficiency gains as it enables collaboration and information sharing between agencies. We have modules for:

- Economic Development
- Workforce Development
- Environmental Health and Safety
- Community Development (Planning, Permitting, & Code Enforcement)
- Citizen Relationship & Request Management
- Grant Tracking
- Public Safety Cadet Recruiting & On-Boarding
- Business Licensing

Grant Tracking

Optimizing Grant Tracking for Maximum Impact

For organizations that rely on grants and funding agreements, financial oversight isn't just about bookkeeping—it's a critical function that impacts operations, compliance, and long-term sustainability. Managing complex funding sources, navigating evolving compliance requirements, and keeping up with administrative demands create an ongoing struggle to maintain control over budgets and expenditures. Each



year, organizations may juggle hundreds of agreements, each with unique spending restrictions, approval processes, and reporting deadlines. Without real-time tracking and centralized oversight, financial data becomes fragmented across spreadsheets, disconnected databases, and outdated systems, making it difficult to monitor spending effectively. This lack of visibility increases the risk of errors, overspending, and missed opportunities to maximize available funds. At the same time, funding agencies require precise and timely reports, yet manual processes and siloed information often lead to delays, inaccuracies, and compliance risks that could result in penalties or even jeopardized future funding.

As administrative bottlenecks slow down expense tracking, approvals, and forecasting, organizations find themselves struggling to keep pace with the financial demands of their programs. Without a streamlined approach to grant management and budget tracking, the challenges only grow, leaving organizations vulnerable to inefficiencies, financial mismanagement, and potential funding loss.

We understand the challenge:

- **Disconnected Financial Systems** – Complex funding streams often don't integrate with existing accounting systems, making it difficult to track expenses and allocate funds accurately.
- **Scattered Data** – Critical financial information is spread across spreadsheets, emails, and disconnected internal systems, leading to inefficiencies, duplication, and errors.
- **Administrative Overload** – Managing hundreds of agreements manually consumes valuable time and resources, increasing the risk of delays and missed reporting deadlines.
- **Lack of Real-Time Visibility** – Without up-to-date financial data, leadership struggles to make informed decisions, while grant managers face challenges in tracking spending, forecasting burn rates, and ensuring compliance.
- **Risk to Financial Oversight** – Inefficient processes and outdated information create compliance risks and threaten the organization's ability to maximize available resources.

Summit Civic Platform

The Summit Civic Platform product enables organizations in the adoption of civic engagement solutions for government. Through the proper implementation of civic engagement, we help enable and improve core processes for city, town, provincial and federal governments.

The Summit Civic Platform Government Modules on the Salesforce Platform implement solutions that uniquely address the diverse needs of government agencies and citizens by enhancing workflow and making publicly available information more accessible. Our modules are for:

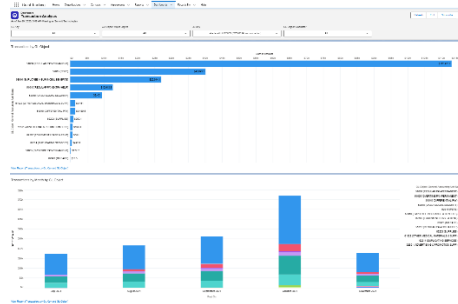
- Economic Development
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The Summit Civic Platform product empowers agencies to reduce workload, increase efficiencies, and provide their citizens and staff with easier, more convenient access to government services.

Why Summit Civic Platform

- We have been building technology solutions for governments since 2016
- Having worked in municipal government, our leadership team understands the challenges that government leaders face
- We have a vision for government working in harmony with itself and its citizens, facilitated by affordable technology solutions
- Our mastery of the Salesforce platform, knowledge of government and pre-built solution accelerators allow us to deliver value quickly, predictably and cost effectively
- Our solutions are not cookie-cutter, one-size-fits-all. They are customized to your organization and needs, with input and feedback from your team every step of the way
- Extensive, customized training is part of every project
- The extensible nature of our solution allows for easy integration with other apps or programs you may be using
- The modular nature of our solution allows for different departments to work on the same platform, easily sharing data and collaborating
- Specialize in no-code or low-code solutions that are easily maintained and scale well

Meet our Grant Tracking Solution

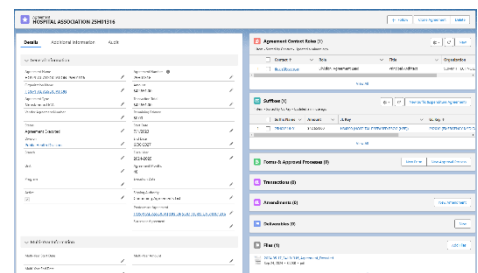
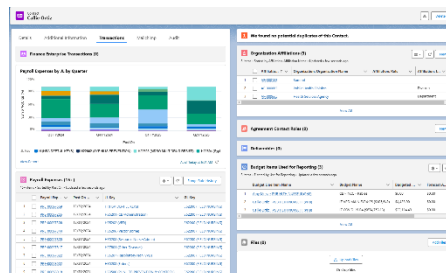


Our Grant Tracking solution is built on the Salesforce platform and is built to streamline the entire Grant Application Tracking and Agreement Lifecycle Management process. By centralizing data into one intuitive platform, we make it easier to manage employee information, budgets, agreements, and deliverables, while automating complex tasks like expense tracking and approval workflows.

Transform Grant Tracking with a Scalable Solution

Key Benefits of Our Grant Tracking Solution:

- **Employee Information:** Syncs with your personnel database to bring in job classifications, pay rates, and more, providing up-to-date employee details.
- **Organization Hierarchy:** The Divisions, Branches, Units, Programs, and Subprograms are tracked and related to employees with their roles.
- **Organizations and Contacts:** Integrates all vendors, funders, and community partners in one place, eliminating data duplication by cross-referencing vendor entries with your accounting system.
- **Email Integration:** Syncs emails from Outlook or Gmail to relevant records, ensuring that communications are tracked and connected to the right agreements and contacts.
- **Revenue & Expenditure Agreements:** Links revenue and expenditure agreements, providing clarity on the flow of funds and simplifying financial management.
- **Agreement Contact Roles:** Employees and Funder/Vendor Contacts are related to agreements with predefined roles.
- **Deliverables:** Grant deadlines for spend reports, progress reports, and other deliverables are scheduled and assigned to the appropriate person with proactive notification of due dates.
- **Budget Tracking:** Grant budgets can be designed in accordance with the funder-provided spend plan, which supports Budget Categories, Budget Line Items, and tracking forecasts and actuals to Budget Periods.
- **Expense Import:** Automates weekly imports of payroll and non-payroll expenses, automatically associating them with vendors, employees, agreements, and various accounting codes.
- **Expense Allocation:** Expenses automatically flow to the budget based on the assigned accounting codes, which can be easily allocated to budget line items.
- **Document Generation & E-Signature:** Automatically pre-populates documents for approvals and generates e-signature envelopes.
- **Approval Processes:** rules-based assignments to automatically select the people who need to sign, view, or receive a copy of a document using the Agreement Contact Roles or Division Contacts.
- **Analytics & Reporting:** Custom dashboards and reports provide key stakeholders with real-time insights into grant performance, project status, and financial health.



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