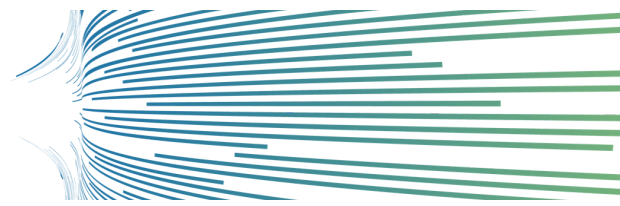


Requirements Questionnaire

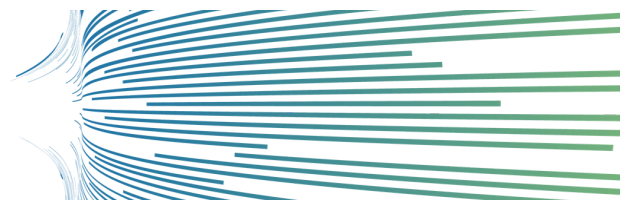


This document provides a breakdown of the Requirements Questionnaire spreadsheet. Each row contains the question, description of the question, and an example for each question. Reach out to your Client Solutions Architect for additional information.

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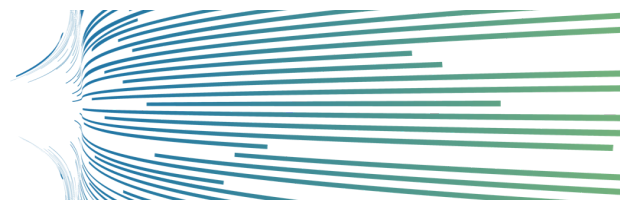
Requirements Questionnaire



Organization Overview

Topic	Question	Description	Example
Organization Name	What is the organization's name?	Include the organization's name	NextEnergy
Website	Does the organization have a website? If so, please provide the URL	Include the organization's website	www.nextenergy.com
Organization Industry	What is the organization's industry?	Identify the organization's industry	Community Development
Organization's Mission	What is the organization's mission?	Include the organization's mission	The mission of NextEnergy is to work with innovators to accelerate smarter, cleaner, more accessible solutions for communities and cities.
Organization Programs	Does the organization have or plan to implement other programs on Zengine?	Include the organization's programs to implement	<ul style="list-style-type: none">• MMFP - Test Site (rolling process with 40 applications)• Real World grants (4 rounds a year with 5-20 applications)
Shared Program Staff	If yes, will there be overlap in the	Indicate if there will be any duplications in program staff	Yes

Requirements Questionnaire

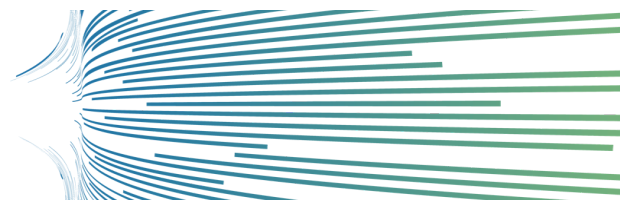


Topic	Question	Description	Example
	program staff across programs?	across the different programs	
Shared Users	If yes, will there be overlap in the applicants or reviewers across programs?	Indicate if there will be any duplicate applicants or reviewers across the different programs	Yes

Program Overview

Topic	Question	Description	Example
Website	Do you have program details on your website? If so, please provide the URL	Indicate whether the organization will include program details on the website	www.nextenergy.com/programs
Type	Is this a grant, scholarship, fellowship, internship, award, or other type of program?	Indicate the type of award that will be provided	Grant, Other
Cycle	Is this offered on a rolling (ongoing) basis, or is it on annual, quarterly, or other cycle?	Indicate how long the programs will last	MMFP will have a rolling process with 40 applications, and Real World Grants will have 4 cycles per year with 5-20 applicants
Cycle Variations	If more than one intake period per year, please confirm there is no variation	Indicate if there is any variation in additional program cycles that you will	No variation

Requirements Questionnaire

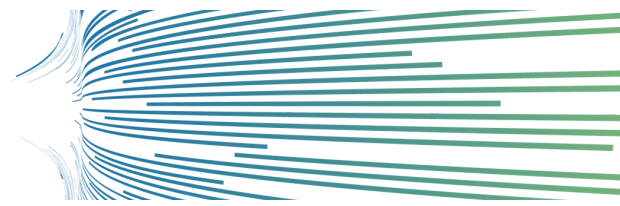


Topic	Question	Description	Example
	in the program process for additional cycles?	run	
Go-Live	When do you want the application to open for applicants?	Indicate the timeline to start accepting applications	MMFP will start accepting application January 6 each year, and Real World Grants will open applications the first Monday in each new quarter

Applicants

Topic	Question	Description	Example
Applicant Type	Are the applicants logging into the application portal applying as individuals, as the primary contact at an organization, or as the primary contact for a team? Please note: we do not support applications requiring multiple contacts to all have edit access at this time. Staff members are able to transfer	Identify whether the applicants are logging in as an individual, primary contact for an organization or the primary contact for a team	Logging in as an individual

Requirements Questionnaire

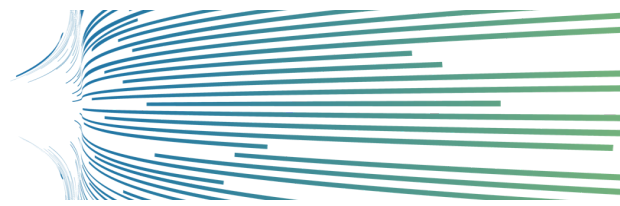


Topic	Question	Description	Example
	applications between contacts.		
SSO	Will applicants login via SSO (single sign on?) We support SAML 2.0. If yes, do you expect to pre-populate their profile (verification with your IT dept will be required as to which fields are supported)	Indicate whether the applicants will utilize a single sign on	No
Privacy Opt-In	Will applicants be required to opt-in to custom privacy language in order to create an account?	Indicate whether applicants will have to opt into a privacy agreement in order to create an account	Yes
Language	Will the applicants need to view the application in any language other than English? If yes, which ones?	Indicate if the application needs to be in different languages	Yes - English, Spanish

Application

Topic	Question	Description	Example
Sample	Are you able to provide a sample of your application? Please attach or include the URL for us to view it.	Indicate whether there is a sample of the application	Yes - Attached

Requirements Questionnaire

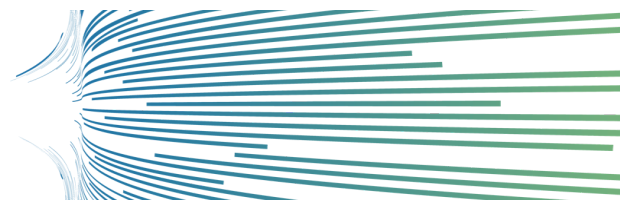


Topic	Question	Description	Example
Number of Applications	Approximately how many applications do you expect per cycle (or yearly, if it is a rolling process)?	Indicate the number of applications that your organization expects to receive per year	MMFP - 40 applications Real World Grants - no more than 20 per quarter (80 year)
Number per Cycle	Can applicants apply more than once within a cycle?	Indicate whether the applicants can apply more than once in a cycle	Can apply multiple times but only can be accepted once per year
Rounds	Is the application broken into more than one round (such as LOI and Full Application for grants)? How many rounds?	Indicate the number of rounds per application	1 round
Type	Will the application be invite-only or open to any applicants? (Invite-only can include nominations processes)	Indicate whether the application is open to anyone or does the applicant need to be invited to apply	Open to anyone that meets the qualifications

Application Components

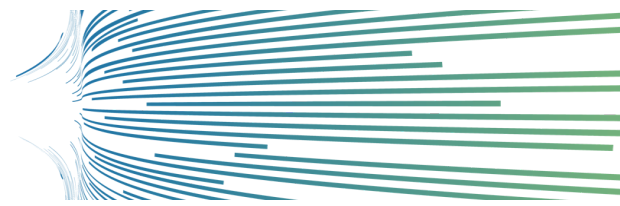
Topic	Question	Description	Example
Eligibility	Are there eligibility questions that the applicant must answer?	Indicate whether there are eligibility requirements that the applicant must meet	Yes

Requirements Questionnaire



Topic	Question	Description	Example
Conditional Logic	Are field rules anticipated in order to show/hide questions based on other answers?	Indicate whether there are any field rules that allow for show/hide questions based on how the applicant answers specific questions	Yes
Budget	Will applicants be required to submit a budget as part of their application? If yes, please provide a sample.	Indicate whether a budget is needed as a part of the application	Yes - Sample Attached
Anticipated Metrics / Outcomes	Will applicants be required to submit anticipated metrics / outcomes as part of their application? If yes, are these a standard list or can they add their own?	Indicate if applicants will be required to submit anticipated metrics or outcomes as a part of the applications process	Yes - standard list
Recommendations	Will applicants be required to request blind letters of recommendation or reference? If yes, how many?	Indicate whether applicants will be able to submit blind letters of recommendation or reference and if so how many	Yes can submit blind letters of recommendation and up to 3
Scoring	Upon submission, do you wish to apply preliminary scoring to any of the questions? If	Indicate if there will be any preliminary scoring to any of the questions	Yes - a list will be provided

Requirements Questionnaire

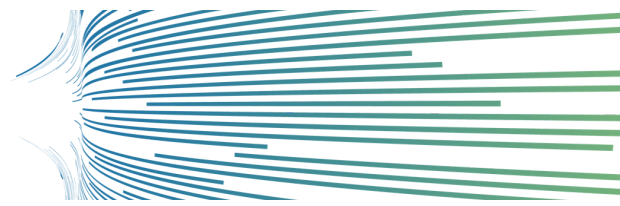


Topic	Question	Description	Example
	yes, please provide more details		

Application Components

Topic	Question	Description	Example
Application Notifications	Do you want the applicant to be automatically emailed when they have submitted an application? Do staff members need to be emailed as well?	Indicate whether the applicant will receive an email upon submitting the application. In addition, indicate whether staff will receive an email as well	Yes - all applicants will receive a submission email and the emails will also be sent to: john.smith@nextenergy.com and julia.smart@nextenergy.com
Applicant Notifications - Multi-lingual	If the application is in multiple languages, do automated applicant notifications also need to be in multiple languages?	Indicate whether applicant notifications need to be provided in multiple languages if the application is in multiple languages	Yes - Notifications need to be provided in English and Spanish based on the application that is completed
Application Reminders	Will applicants need email reminders prior to the deadline?	Yes - want this automated for rolling applications (via zapier)	Yes - automated email reminders

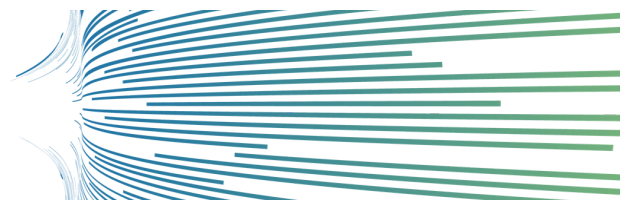
Requirements Questionnaire



Advanced Application Scenarios

Topic	Question	Description	Example
Other application notes	If there is anything else unique about your application process, please share more details (for example, payment required, multiple streams like employer/student, matching to scholarships, other validations / lookups).	Indicate if there are any unique rules or items about the application process	There are not any unique rules
Payments	Will you require payment for the application?	Indicate if you will require payment for the application	Yes via Stripe invoicing
Multiple Streams	Are there multiple streams requiring more than one submission portal (for example - employer/student)	Indicate if multiple submission portals are needed	Yes
Scholarship Matching	Do applications need to be matched to scholarships for eligibility determination? (Note: this can only happen after submission)	Indicate whether applications need to be matched with scholarships to help determine eligibility	Yes

Requirements Questionnaire

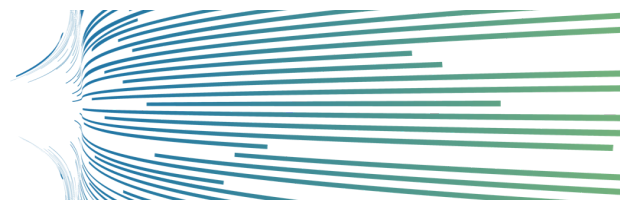


Topic	Question	Description	Example
Other Application Automations	Are other automations required for the application process (such as other validations or lookups to populate data)	Indicate whether other system automations are required for the application process	Yes

Staff Review

Topic	Question	Description	Example
Program Staff	Approximately how many program staff members will use the administrative portal?	Indicate how many program staff will use that portal as administrators	3
Staff Permissions	Will various permissions be required for these staff members?	Indicate whether various permissions are required for staff members	Yes 5+ roles
Staff SSO	Will program staff login via SSO (single sign on?) We support SAML 2.0.	Indicate whether program staff will use single sign on to access the system	Yes
Staff Review	Will staff review (generally for eligibility and completeness), prior to promoting to a committee for review)?	Indicate whether the staff will review applications for eligibility or completeness prior to sending to committee review	Yes

Requirements Questionnaire

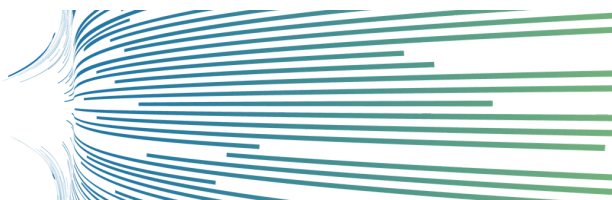


Topic	Question	Description	Example
Changes Requested	Could staff request that the applicant submit changes to their application?	Indicate whether the staff could request for the applicant to submit changes to the application	Yes
Compliance Checking	Will staff use Guidestar Charity check, or any other tools for compliance checking?	Indicate if the staff will use Guidestar Charity Check or other compliance checking tools	Yes - results marked manually
Other staff review notes	Is there anything else we should know about your staff review process?	Indicate if there anything else that we should know about the staff review process	No

Committee Review

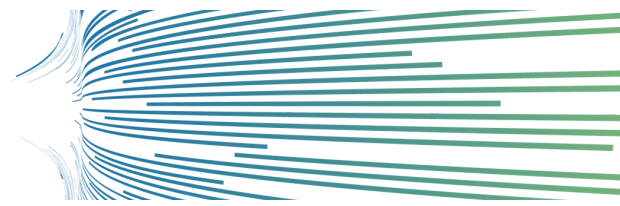
Topic	Question	Description	Example
Rounds	Are there 1 or more rounds of committee review? If more than 1, please let us know how many and provide a brief description of the differences	Indicate how many rounds of committee review there are	1 Committee Review
Reviewers	Approximately how many reviewers will use the review portal?	Indicate how many reviewers will use the review portal	6

Requirements Questionnaire



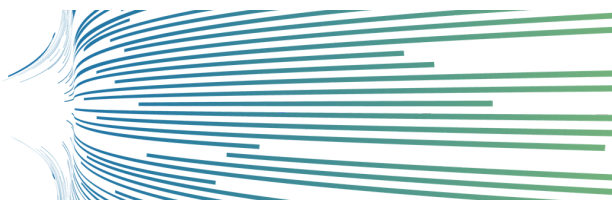
Topic	Question	Description	Example
SSO	Will reviewers login via SSO (single sign on?) We support SAML 2.0.	Indicate whether reviewers will login in via Single Sign On	No
Committees	Will the reviewers be divided into committees? If yes, based on what? About how many reviewers per committee?	Indicate if the reviewers will be divided into committees and if so, what are they based on and how many reviewers for committee	Reviewers are not divided by committee and there can be no more than 3 reviewers on a committee
Review Assignments	Generally reviewers are assigned manually, automatically by committee, or via batch assignment (for example, all applications should be assigned 3 reviewers, or each reviewer should only be assigned 5 applications). Will one of these work? If not, please provide more details about your ideal assignment scenario	Indicate whether reviewers are assigned manually, automatically by committee, or via batch assignment	Standard Assignment Options
Reviewer Assignment Notifications	Do you want the reviewer to be automatically	Indicate whether the reviewer needs to be automatically	Bulk Email

Requirements Questionnaire



Topic	Question	Description	Example
	emailed when they have been assigned a review, or will staff members bulk email all reviewers at once?	emailed when an application has been assigned for review	
Reviewer Reminders	Will reviewers need email reminders prior to the deadline?	Indicate whether reviewers will need email reminders prior to the deadline	Yes - automated for rolling review process
Conflict of Interest	Should reviewers have the ability to opt out of a review due to conflict of interest?	Indicate whether reviewers have the ability to opt out of a review due to a conflict of interest	Yes
Sample	<p>If you have samples of the review rubric/form that your committee will complete, please provide it.</p> <p>Are review rubrics/forms the same at each round of review if multiple in scope? Within a round of review are the review rubric/forms the same across committees/reviewers?</p>	<p>Indicate whether you have samples of the review rubric that the committee will complete and if the same form will be used on each round of the process</p>	Yes and Different Review Rubrics will be provided for each round

Requirements Questionnaire

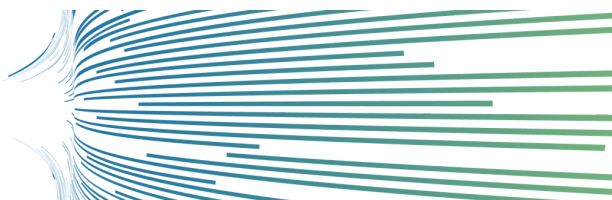


Topic	Question	Description	Example
Other committee review notes	Is there anything else we should know about your committee review process?	Provide any additional details regarding the committee review process	None

Decision Making

Topic	Question	Description	Example
Overview	How are decisions made? (for example, staff decides based on reviewer feedback, committees decide, etc)	Indicate how decisions are made	Committee decides
Decision Statuses	What are the possible decisions? (for example, Awarded, Not Awarded, Waitlisted)	Indicate the possible decisions	Awarded Not Awarded
Automated Decisions	Should any decisions be taken automatically based on # of reviews and/or score?	Indicate whether decisions should be made automatically based on the number of reviews and the score	Yes
Internal Approvals	Will decisions require any additional internal approvals? If yes,	Indicate if decisions will require any additional internal approval.	No

Requirements Questionnaire

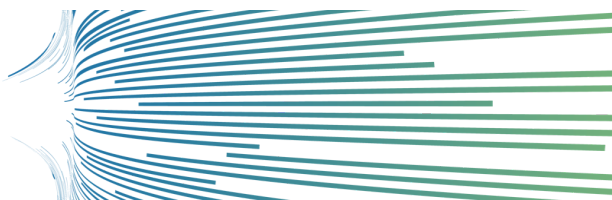


Topic	Question	Description	Example
	please describe whether it requires sequential approval or if all approvers can view and approve the awards at once.		
Board Approvals	Will decisions require board approval? If yes, will program staff export data for them to review, or will the board also use their own review portal?	Indicate if decisions will require board approval and if so how	Yes - Review Portal
Other decision making notes	Is there anything else we should know about your decision making process?	Provide any other details about the decision making process	None

Awards

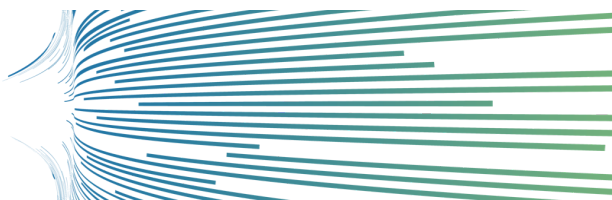
Topic	Question	Description	Example
Fund Tracking	Are awards made from a single pool of funds or from multiple funds?	Indicate whether the awards are made from 1 pool of funds or multiple funds	1 pool of funds
Length	Are awards generally for a year or for a	Indicate the timeframe for awards	Yearly award

Requirements Questionnaire



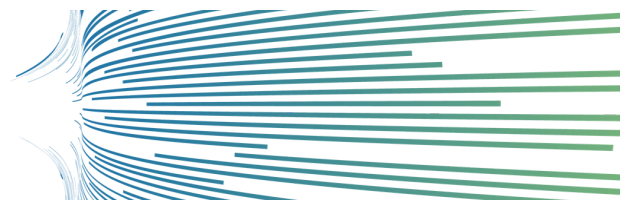
Topic	Question	Description	Example
	different time frame?		
Disbursements	How many disbursements are there, and on what cadence will they be disbursed? Are they contingent on anything (for example - first disbursement contingent on signed agreement, remaining disbursements contingent on progress report approval)	Indicate how many disbursements are available and how they are disbursed. Also determine if there are any contingencies that must be filled before disbursement	Funds are disbursed quarterly and must have submitted progress report to receive the next disbursement on time
Reimbursements	Alternatively, will awardees need to request reimbursement?	Indicate whether awardees will need to request reimbursement	Yes
Agreement	Will a PDF agreement be generated? If yes, please provide a sample if available. Will multiple versions of the agreement be	Indicate if a PDF agreement will be generated, and how many multiple versions of the agreement are needed	Yes - 2 (English and Spanish)

Requirements Questionnaire



Topic	Question	Description	Example
	needed? Versions in multiple languages?		
Agreement Acceptance	Do awardees need to sign the agreement, or is a check the box acknowledgment sufficient?	Indicate whether awardees need to sign the agreement or if it is sufficient to check the acknowledgment checkbox	Yes - Sign/Upload
DocuSign	Is integration with DocuSign required?	Indicate if integration with DocuSign is required	Yes
Award Notifications	Will all applicants be notified of their award disposition at once, or should they be notified as the award decisions are made?	Indicate whether the applicants will be notified of their award disposition at once or once the decisions are made	Yes - at once
Other award notes	Please provide additional notes related to the Award process	Provide additional notes related to the Award process	None

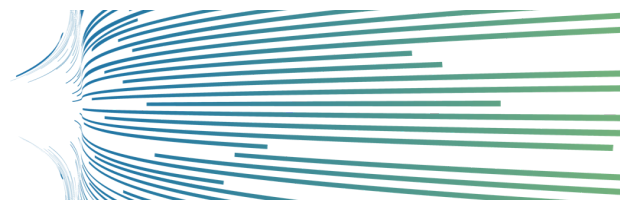
Requirements Questionnaire



Progress Reporting

Topic	Question	Description	Example
Sample	Please provide sample progress reports, if available	Provide a sample of the progress report	Attached
Cadence	What cadence will progress reports be due? (for example: quarterly, yearly, just one final report)	Indicate when progress reports will be due	quarterly
Pre-fill	Do progress reports need to be pre-filled with data from the award or application? If yes, please describe	Indicate if progress reports need to be prefilled with information from the award or application	Yes - organization name, budget, milestones
Budget	Are budget updates required?	Indicate whether budget updates are required	Yes
Approval	Please describe the progress report approval process	Describe the progress report approval process	Review Portal
Other progress report notes	Please provide additional notes related to the progress reporting process	Provide additional notes related to the progress reporting process	None

Requirements Questionnaire



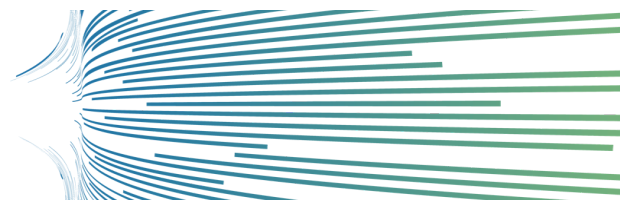
Renewals

Topic	Question	Description	Example
Overview	Are awards renewable? If yes - do they need to complete a whole new application, or just a progress report?	Indicate if awards are renewable	Yes - Progress Report only needed
Approval	Please describe the approval process if renewals are done via progress report.	Describe the approval process for renewals that are done via the progress report	Review Portal

Disbursements

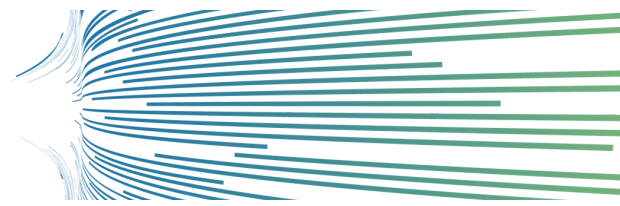
Topic	Question	Description	Example
Approval	Please describe the disbursement approval process	Describe the disbursement approval process	Review Portal
Export	Will you require an export of approved disbursements? This is typical to share with finance teams that are not in Zengine, or to import into accounting software	Indicate if you will require an export of approved disbursements	Yes
Import	Will you require import of paid disbursements?	Indicate if you will require import of paid disbursements	Yes

Requirements Questionnaire



Topic	Question	Description	Example
	This is typical to update disbursement statuses with additional information		
Financial System Integration	Will you require an integration with your financial system? If so, please provide your organization's financial accounting system? <i>(Not sure if this should be included in this list or are we managing integrations completely separate?)</i>	Indicate if you will require an integration with your financial system	Yes
Unused Funds	Is it possible to reach the end of the award period, and for awardees to have to return unused funds? <i>(Note: this is rare)</i>	Indicate whether it is possible to reach the end of the award period and have to return unused funds	Yes
Other disbursement notes	Please provide additional notes related to the disbursement process	Provide any additional notes related to the disbursement process	None

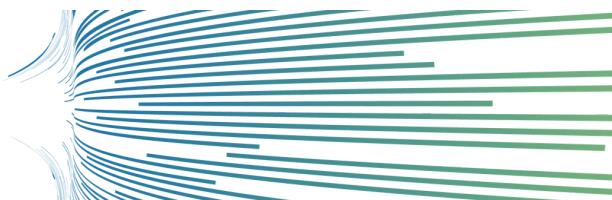
Requirements Questionnaire



Reimbursements

Topic	Question	Description	Example
Sample	Please provide a sample reimbursement form, if available	Indicate if a sample reimbursement form is available	Yes - Attached
Tie to Budget	Do reimbursement requests need to be tied to approved budget line items?	Indicate whether reimbursement requests need to be tied to specific budget line items	Yes
Approval	Please describe the reimbursement approval process	Describe the reimbursement approval process	Review Portal
Export	Will you require an export of approved reimbursements? This is typical to share with finance teams that are not in Zengine, or to import into accounting software	Indicate whether you will require an export of approved reimbursements	No
Import	Will you require import of paid reimbursements? This is typical to update disbursement statuses with additional information	Indicate you will require import of paid reimbursements	No

Requirements Questionnaire

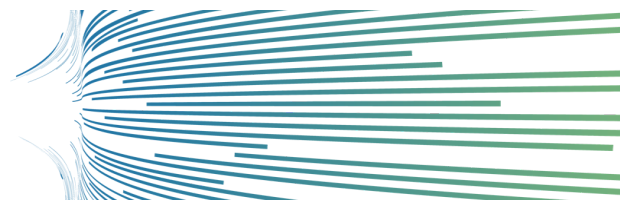


Topic	Question	Description	Example
Other reimbursement notes	Please provide additional notes related to the reimbursement process	Provide any additional notes in regards to the reimbursement process	None

Amendment Requests

Topic	Question	Description	Example
Overview	Can awardees request amendments?	Indicate whether awardees can request amendments	Yes
Portal	Will awardees request amendments via portal (encourages amendment requests) or via email (discourages amendment requests)	Indicate whether awardees can request amendments via the portal or via email	Yes - Portal
Approval	Please describe the amendment request approval process	Describe the amendment request approval process	Review Portal
Agreement	Does a new agreement need to be signed if an amendment request is approved?	Indicate whether a new agreement need to be signed if an amendment request is approved	Yes - DocuSign/ 2nd Portal

Requirements Questionnaire



Topic	Question	Description	Example
Downstream impacts	Can an amendment impact the number or content of progress reports or disbursements?	Indicate whether an amendment can impact the number or contents of the progress reports or disbursements	Yes
Other amendment notes	Please provide additional notes related to the amendment process	Indicate any additional notes related to the amendment process	None

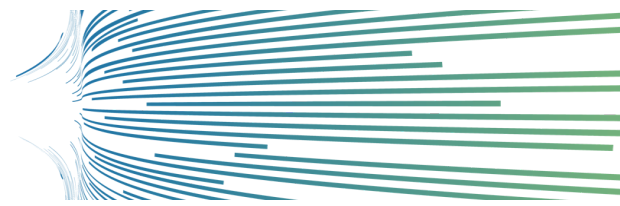
Stakeholders

Topic	Question	Description	Example
Other	Are there other stakeholders involved in the process that weren't described above?	Indicate whether there are any other stakeholders involved in the process that have not already been mentioned	No

Integrations

Topic	Question	Description	Example
3rd party systems	Do you wish to integrate with any 3rd party systems, such as Salesforce? If yes, please provide more details on your ideal scenario.	Indicate whether you plan on integrating with 3rd party systems	No

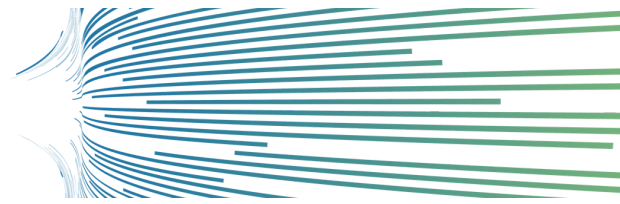
Requirements Questionnaire



Data Migration

Topic	Question	Description	Example
Historical Import	<p>Do you have data that needs to be imported from another system? If yes - from what system, and approximately how many records?</p> <p>Are you beginning the current year's program process midway? Is an import of data required to go live this program year?</p>	Indicate whether data that needs to be imported from another system, and include the number of records and from what system	Yes - by Wizehive 50 records
CSV	Do you know if it is possible for you to create CSV (Excel-like) files from your historical data, with our guidance?	Indicate whether you can create Excel files or CSV files from your data	No
File Imports	Do file attachments also need to be migrated? Note: this can be very cumbersome, so if you have a backup option to store historical files elsewhere please note that.	Indicate whether file attachments need to be migrated	No

Requirements Questionnaire



Staff Reporting

Topic	Question	Description	Example
Report Generation	Are there specific reports you need to generate?	Indicate if there are any specific report that must be generated	Yes - Dashboard Only
Bulk export	Does program staff need to be able to bulk download all applications with attachments?	Indicate if the program staff need to be able to download applications with attachments in bulk	Yes - Portal and plugin