A Consumers Guide to Grants Management Systems

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INTRODUCTION

Grantmaking programs are complicated to manage. Even the relatively small programs can involve tracking dozens of applications, reviewers, requirements, and payments. But grants management software can help by saving grantmakers time, making their processes more effective and transparent, and even transforming the way they do business.

We'll take a look at what grants management systems do, and compare the strengths and weakness of the packages available for grantmakers.

Grantmakers' choices are growing each year, and the systems available to them range in complexity and price. Small packages can support straightforward online application, review, and progress reporting processes for $2,400 a year, while a specialty solution for a very large grantmaking organization can cost upward of $200,000.

How do you choose the right system for your needs? This report is a good place to start—we've done a lot of the work for you. We'll explore the available options for accepting and reviewing applications and tracking grants throughout their life cycles, take a look at what grants management systems do, and compare the strengths and weakness of the packages available for United States-based foundations. Then we'll recommend packages that might work for your organization based on your specific needs.

This report focuses on systems that help *private foundations* manage their grantmaking process through the entire grants lifecycle, including payment tracking. Community foundations differ from private foundations in several important areas, and are therefore not included in this report. See Idealware's January 2012 *Consumers Guide to Integrated Software for Community Foundations* for an in-depth look at these systems. You can download that report for free at http://www.idealware.org/reports/community-foundations.

Note that there's another kind of grants management system entirely—one designed to help the recipients of grants rather than grantmakers. These systems help nonprofits manage proposal submissions and grants they've received, and confusingly, are also known as grants management systems. We did not evaluate this functionality in this report—although a few of these systems, such as Common Grant Application and MOSAIC, are designed to support both grantees and grantmakers.

What's Changed Since the Last Report?

We released the first edition of our *Consumers Guide to Grants Management Systems* in 2008, a subsequent major revision in 2011, and a final appendix in January of 2012. Once again, we've found that the field of systems has evolved substantially.

There's more of an emphasis on workflows to automate processes in many of the systems, and on integrating grants management systems with external sources of data and other systems that a foundation uses. Grants management vendors continue to move toward cloud-based delivery of their products, and there's a strong trend toward a more widely accessible user interface, so that even casual users of the system can find the data they need quickly.

What's New in Our Methodology?

For 2013, Idealware has given our methodology a facelift, too. We've included seven new systems in this report, and, for the first time, we opened up our evaluation criteria for public review and comment. We've also conducted a customer survey of users of grants management systems on their experience with the vendor's support and training options, which is published alongside the longer write-ups that discuss each system's features and functions. Finally, we've incorporated the criteria from our 2010 report, *Streamlining Online Grant Applications: A Review of Vendors,* in recognition that nearly every vendor included in this report now supports online applications. For a full summary of changes made to the rubric, see Appendix C: Summary of Changes to Rubric for 2013 Consumers Guide to Grants Management Systems, on page 285.

More advanced functionality, like branching in online forms and robust budgeting facility, has become far more common.

DO YOU NEED A GRANTS MANAGEMENT SYSTEM?

If your processes are complex enough that you're wondering whether a grants management system might be helpful, it's probably worth taking a look at the available packages. Generally speaking, grants management processes can be complicated. Even grantmakers who give just a dozen or so grants a year might find a system useful—especially if they involve multiple people in the review process, pay grants in more than a single payment, require progress reports from grantees, or want to look at reports that summarize information about their grantmaking in aggregate.

Another key benefit of a packaged system, even for a small foundation, is the ability to collect data online—for example, grant applications or grantee progress reports. If you're considering shifting your processes online, a grants management system can provide both online and grant-tracking functionality in a single package.

As a rule of thumb, if you find your grants can't easily be tracked on a single Excel worksheet, a packaged system is worth considering. You should also look at the available packaged options if you're debating building something yourself, such as a Microsoft Access database to track grants, or web forms to accept online applications. Custom-built functionality is almost always a bigger long-term investment, both to build and support, than organizations expect. It should be a last resort when it's clear nothing on the market will meet your needs. We reviewed strong solutions that start at under $3,000 per year, putting them within the reach of nearly every organization; if you're relying on Excel to track grants, you'll likely find ample enticement to make the move to a dedicated grants management system.

If you find your grants can't easily be tracked on a single Excel worksheet, you'll likely find a packaged system helpful.

WHAT TYPES OF SYSTEMS ARE AVAILABLE?

As you start to consider your options, think through what *types* of systems might work for you before considering *specific* systems: Online hosted or Installed, Integrated with Back Office Services, Specialized for Community Foundations, or Custom-Built.

It makes sense to think through what types of packages might work for you before considering specific systems.

Online Hosted Systems

A growing number of grants management systems are hosted entirely online, accessible through web browsers. In this model, sometimes called Software-as-a-Service (SaaS), you pay a software vendor to provide online access, and the software—along with all your grants data—is stored on the vendor's servers. The benefits are that you don't have to purchase any hardware, the vendor handles software updates and data backups, and your staff can access the system from anywhere there's an internet connection. This model also places significantly less burden on your foundation's IT department (at least in theory).

But ongoing security breaches involving online services have led some to question this kind of system. The truth is, it can be quite secure—in fact, many banks and hospitals with far greater security needs rely on similar models. Security issues are not limited to SaaS platforms; similar breaches have occurred with systems installed on site at organizational data centers behind company firewalls. In this year's update, we've asked more about how software vendors protect the security and integrity of your data.

The online systems currently available typically offer strong support for online data collection, including online applications, review processes, and progress reports. They range from straightforward, inexpensive packages starting at $2,400 per year all the way up to very sophisticated, customized systems for more than $200,000 per year.

Installed Systems

A more traditional option, these systems are purchased up front and installed onto your network and your staff's computers. Many of these systems only run on the Microsoft Windows operating system, so if your organization uses Mac or Linux machines, you may have a difficult time finding one that's compatible. With this model, you're responsible for software updates and data backups.

The available installed systems tend to be strong in the kinds of features that can help your staff manage a complex process, such as the ability to code grants with keywords and easily create printed letters, but can be weaker in online data collection. Some require external modules to support online applications and progress reports, or to let you send email from within the system. They typically cost more in the first year than the online systems, ranging from $2,400 to $200,000 or more for the first year, but many are more affordable on a per-year basis after that.

A few of the higher-end systems use a different installed model, and offer software that you buy and install on your own web server—like Online hosted systems, your staff can then access it from anywhere there's an internet connection, and it easily supports online data collection. It also provides more control over technical details than a hosted system. However, you'll need to purchase the hardware required to host the system, and you'll need qualified IT staff to install and update the software and back up the data. You'll also need to ensure that the system is hosted securely and reliably.

Systems Integrated with Back Office Services

A few companies offer online grants management systems as part of a much larger service offering that includes staff support for a full range of back office services, like payment processing, mailings, accounting, and tax preparation. While this report does not focus on service providers, one vendor provides their grants management package separate from their back office services, and we've reviewed that solution.

Specialized Community Foundation Systems

Community foundations often have such complex requirements on top of the more universal grants management needs that a group of software packages has been developed to meet them. Because this report focuses on private foundations, it doesn't cover community foundation systems. See Idealware's January 2012 *Consumers Guide to Integrated Software for Community Foundations* for an in-depth look at these systems. You can download that report for free at http://www.idealware.org/reports/community-foundations.

Custom-Built Systems

This report focuses on packaged solutions, but building your own system can be a useful alternative for large foundations with truly unique needs. Going down this road merits caution, however, as it can be expensive, lengthy, and risky. Make sure you have a good reason to build a system around your unique needs rather than standardizing your processes to better match industry best practices. And think through the long-term ramifications of becoming a software developer—you'll not only need to pay to create the system initially, but to maintain it and upgrade it to match changes in your processes or other software packages. The experts we interviewed for this year's update reported that building custom systems is growing less common as a strategy for grantmakers, too, so think about reaching out to peer institutions to find out what they are considering.

If you are looking into building a custom system, consider starting with a flexible platform, such as Salesforce, Microsoft's SharePoint, or the Microsoft Dynamics CRM. This strategy can give you solid base functionality that can be customized and built on to meet your needs. Salesforce is a highly extendable online system with strengths in managing constituent information and internal workflow. (The nonprofit consulting firm NPower has built a grants management solution on top of Salesforce in Foundation-Connect, reviewed in-depth in this guide.) SharePoint provides a toolset with sophisticated document management facilities and support for integrating online and offline data. A few of the vendors reviewed in this guide—including Fluxx and Versaic—offer highly flexible platforms that can be extensively configured to meet your foundation's needs, too.

WHAT DO GRANTS MANAGEMENT SYSTEMS DO?

It's difficult to think about your own needs or evaluate the systems that are available without a solid understanding of what types of features are possible and which are common. Based on our interviews with foundation staff and reviews of various systems, we learned a few things about what's typically available and about what's desirable. More is not always better. The right system for your organization is the one that best supports your needs, not necessarily the one that has the most features. Feature-rich solutions can also be needlessly complex, and may present an unnecessarily high learning curve for your staff.

Use this section to construct a list of the features that might be useful to you, and then carefully prioritize the list for your own organization.

> Software varies widely in support for online applications. Some packages barely support them, while others are built around them.

Internal Tracking

At its simplest, a grants management system needs to do two things: store basic information about grant projects so you can easily retrieve it (for example, name, sponsor, and contact) and track the project's status as it moves through your organization's process. Useful additional features include the ability to upload documents, such as proof of 501(c)(3) status, or electronic copies of proposals in various file formats. Every system we looked at handles these basic functions, but with varying degrees of ease and flexibility.

If you plan to receive grant proposals by means other than an online application, such as email or post, make sure the software accommodates you. While some packages provide forms to facilitate data entry, others expect all grant project information to be entered by grantees and make it difficult or impossible for grantmakers to change project names, update contacts, or upload documents themselves. Some even require grantmakers to log in as grantees, which is an awkward step.

The ability to categorize grant projects also varies widely between systems. Consider how you'd like to label grant projects in order to group them and report on them—for example, by grant program, by geographic or population-based categorization code, or by other fields such as dates. Will the system allow you to define new fields, or will it limit you to a few core categories? Can you define those categories for a grant application or only for approved grants? Can you split grants across multiple categories, and track allocations by percentage or actual dollar amount? Grantmakers sometimes need to make similar updates to data across several grant records. Some grants management systems nicely facilitate batch changes to data while others leave you to make such updates on a record-by-record basis. Vendors that align to a consulting services model may perform batch updates for you.

There is renewed interest in the grantmaking community in a common vocabulary, or in more technical terms, a shared taxonomy for the sector that is implemented in grants management systems. We asked vendors about their willingness to support this strategy, too.

Online Applications

Grantmakers are increasingly accepting grant proposals online, which can considerably streamline operations by reducing the need to manage paper proposals, enter data, and follow up on missing information.

The sector is increasingly advocating to streamline the online application process for grantseekers.

But grants management software varies widely in its support for online applications. Some systems barely support them at all, while others are built around them. However, the sector is increasingly advocating to streamline the online application process for grantseekers. One example of this evolution is the forthcoming project Simplify, a collaboration between GuideStar and TAG to create a standards-setting process and database that help grantees more easily share common data with funders. Those behind the project hope that the vendors profiled in this report will modify their software so their foundation clients can use the Simplify data in their grants management software systems.

Online application processes can grow complicated, especially if you accept unsolicited proposals. Some packages support an interactive qualifying round, sometimes called an eligibility quiz, in which applicants answer a few questions to determine whether they're allowed to move forward in the process. Most allow at least a two-stage process that supports both an initial Letter of Intent and a more detailed proposal. If your application process contains multiple stages, check to see if the software will roll information from one stage to the next so grantees don't have to re-enter a project description with a proposal if they've already entered it with a Letter of Intent. Most systems also allow applicants to avoid large amounts of redundant data entry by letting them reuse information from one application stage to another, and from one application to the next. Some systems support branching capabilities in online forms to collect different information from applicants based on the information they provide.

For this update, we've incorporated and modernized the criteria from our 2010 *Streamlining Online Grant Applications: A Review of Vendors* report, in which we addressed some of the issues common to online applications. For example, online forms can "time out" unexpectedly and lead to the loss of significant time and data entry. Some systems mitigate this by automatically saving online form entries at regular intervals. A few simply warn users to save, while many others present a save button and rely on user diligence to make sure they don't lose any work. You should also be able to save incomplete applications and return to them. Most online application schemes let you use browser-based spell-checking to proof your work, but a few packages include built-in spell-checkers.

Most systems allow grantees to register themselves and set a user name and password. You can limit the registrations by selectively sharing the web address. Some of the more advanced systems let prospective grantees set up multiple accounts for a single application—for example, to allow a financial staff member to enter budget information—and transfer account histories between logins without contacting the foundation or the vendor. A few even support submissions from other sources, such as references, that are kept invisible to the applicants.

Once applications are submitted, applicants should receive confirmation emails. Some systems let you customize the text of that email. Check to make sure their application then flows seamlessly into your own administrative interface—if not, you'll have to take the time to do manual data transfers. Can applicants check the status of their requests online as they move through your review process? If not, they'll have to call you for updates. You might also want the ability to collaborate with applicants on applications in progress, and provide comments and feedback before the applications are even submitted—some systems will let you do so. A few systems have even streamlined the online application process so that applicants can log in and see all proposals in progress with any funders who happen to use the grants management system to manage their processes, rather than having to register multiple accounts. Most systems will allow applicants to upload attachments, in some cases including video or audio files—check if virus scans for such uploads conform to your foundation's specifications.

Form Design and Flexibility

Online applications collect information from prospective grantees in online data fields like text boxes, drop-down boxes, and checkboxes, and let grantees upload files. More advanced systems might include complex budget forms, or the ability to submit a portfolio of work. Most also support applications with multiple pages and sections, but only allow the use of their built-in spell-checkers. You should be able to set character limits for text fields in the system and be able to display prominently to applicants how many characters are left; ideally, you can display word counts, not just character counts. Most systems also let you customize in-application help for grantees, either through hover-over text, FAQs, or more innovative means, like videos.

All systems allow you to customize the fields that you collect. Some make it easy for you to add or update applications, while others charge you for every change. Check to see if you can customize forms with your organization's logo, colors, and fonts to match the rest of your website.

Application Review

Once you've received grant applications, a grant management system should help manage the process of reviewing them and deciding what to fund. For simple tracking purposes, some systems provide a "checklist" to help ensure you have all the information you need to consider a grant.

Make sure it's easy for application reviewers to see and print all the information necessary to consider an application. For example, can you easily print a summary, or

Packages provide varying degrees of support for more complex review processes. Can you track comments from more than one person? Store complex scoring criteria? Let people review online?

only a document with every field and attachment in the proposal? Can you see whether you've previously awarded any grants to the applicant? It can also be useful to provide reviewers a stripped-down version of the system so they don't have to wade through every detail of an application to read the relevant information and add their comments.

Software packages provide varying degrees of support for more complex review processes. For example, will the system let you track comments and scores from more than one person? Can you define complex scoring criteria, such as multiple scores grouped into categories? Can scoring criteria vary between different grant programs or do you have to apply the same standards to all applications? It may be useful to be able to view summary statistics about those scores—for example, comparing average scores between different proposals—and allow reviewers to see the scores and comments of other reviewers.

Many systems allow reviewers to see and rate applications online. This allows internal staff to review applications from any location, and provides an opportunity for you to involve people from outside your organization as reviewers. If you do plan to include external reviewers, consider features that allow you to manage this process in detail. Can reviewers choose which proposal to review, and easily see and print both the proposals and any attachments? Can they flag conflicts of interest—for example, if they work for the same university as a grant applicant? Can you match reviewers to proposals based on keywords, demographic data, or level of expertise, or see how the average scores of reviewers compare in order to identify those who will typically score proposals higher or lower? Can foundation staff be notified when reviews are completed—either via email or within the system?

501(c)(3) and OFAC Status

As a routine part of the review process, grantmakers often check applicants' tax exempt, or 501(c)(3), status. Many grant management systems allow you to easily click through on an Employee Identification Number (EIN) to see the applicants' record and tax status on GuideStar, the online nonprofit organization database. Some allow you to screen capture the GuideStar record, which is useful for audit purposes. A few even check the status of each organization automatically and flag those that are not tax exempt, autofilling relevant information in the system, and can check against all organizations classified as 501s by the IRS, not just 501(c)(3).

Laws passed in the wake of September 11, 2001, suggest that grantmakers should check all grantee organizations and contacts against the Office of Foreign Assets Control (OFAC) and Specially Designated Nationals (SDN) lists of individuals and organizations with terrorist ties. It may be helpful to your organization to have software features that facilitate the process. Some systems integrate with external OFAC list-checking websites or systems to make it easier to flag possible matches. Others provide these list-checking features within the grants management system itself. Some grantmakers may be interested in systems that can complete both the 501 and OFAC checking processes in batch, and can generate an audit trail of every time this information was checked for compliance purposes.

Creating Letters and Board Dockets

Grants management processes can be document-heavy. Grantmakers often need to create not only printed letters, but also printed board dockets that allow board members to review all the proposals under consideration. Systems with sophisticated functionality in this area allow you to create your own letter and docket templates, which can include personalized text, mail-merged grant data, and custom formats, fonts, and logos. Many integrate with Microsoft Word's mail-merge functionality.

If you will be printing letters or docket information for a large number of grants at one time, some systems allow you to easily create documents for a whole pool of grants in a single step. It can then be useful to be able to review and tweak each individual letter or docket before it is printed.

Some tools make it difficult to create custom printed documents.

Some of the less-expensive online tools make it difficult to create custom-printed documents. For example, you may not be able to choose which fields to include on a docket summary sheet, or customize the formatting in any way. A few systems require you to export data into Microsoft Excel if you want to mail-merge.

Foundations that need to manage substantial amounts of supporting documents related to grants might appreciate the ability to attach documents to board dockets. This feature allows staff to easily supply board members with overall documents relevant to a whole grant cycle (for example, a letter introducing the grantmaking priorities for the cycle). We also looked into support for electronic signatures within the system, including external verification, as well as support for board review on tablet devices like iPads.

Email

Grantmakers have wholeheartedly embraced electronic communications over printing and mailing traditional letters. Most grants management systems support email in some form. Most store addresses and let you send email by clicking on a contact, and some allow you to email multiple contacts at once—for example, to send information about an upcoming event to all the grantees in a particular program.

Email templates, such as a boilerplate email informing applicants that their application has moved to the next stage in the review process, can be helpful. Many systems allow for more robust templates, including support for mail-merged fields (such as the project name) or file attachments (such as a budget spreadsheet template). Some also offer in-system spell-check and delivery statistics that show how many messages were opened, read, deleted, or rejected by recipients' servers.

The ability to send automated emails from the grants management system can be a useful way to email grantees a notification upon receipt of a completed application, or when due dates for deliverables are approaching. Most systems provide some support for emails triggered by schedules and system events, and a few provide robust control over such automated email.

Email delivery reports can be useful for grantmakers who intend to send bulk email from their grants management systems. A few solutions in this report offer email delivery reports including open, click-through, and unsubscribe rates, but most do not. If your organization plans to send bulk email through its grants management system, you'll also want to consider how this email is sent. Some systems send out email through your own organization's email server, which works fine for individual emails, or emails to a few dozen people, but is risky if you email thousands of prospective grantees. On a big list, some people will flag your email as spam no matter how careful you are. Over time, those complaints build up, and you run the risk of having your whole domain blacklisted. That means that none of your organization's email—including email directly from staff members—will go through. It's not likely, but it does happen, and it can take weeks to get removed from blacklists when it does.

In general, Idealware recommends sending broadcast emails through vendors' servers, which would mean either choosing a system that allows that or option for a third party broadcast email tool instead. We also recommend steering clear of systems that send out group emails via blind copy rather than one-to-one—that's another spam trigger.

Relationship Management

During the course of a grant, grantees are likely to interact regularly with various people at your organization. Grants management systems can help track these interactions. What communications have you sent a grantee? Who have they spoken with, and about what?

To do this effectively, a system must track organizations separately from individual grants—to allow you, for example, to see what conversations you had about a previous grant when a new one is under review. It can also be helpful to track the names and roles of individual staff members at a grantee organization. This is particularly important for large institutions such as universities, where different researchers may apply separately for grants.

Grants management systems can help track your interactions with grantees. With whom have you spoken, and about what?

Grantmakers sometimes give grants to units of larger organizations—for example, they may award money to the school of education within a university. Your grants management system should let you track these grants by business unit, as well as by the organization in which it lives. Many systems that support email or mail-merged letters also automatically store records of those communications. It's also useful to be able to store a log of communications for a particular contact or grant—for example, to track email sent outside the system, or telephone communications with grantees.

In addition to logging emails sent within the grants management system, it can be useful to capture into the system emails sent externally—for example, through Outlook. A few systems allow you to do this easily, and some even let you synchronize your contacts with Outlook.

Grant Requirements and Evaluation

Once a grant is approved, many grantmakers require grantees to file interim progress reports of some kind. A number of packages provide checklist functionality that lets you define those requirements or others, such as the need to do a site visit, and assign them to staff or grantees with a due date. Some systems require you to manually set up requirements for each individual grant. Others let you set up default requirements that can be applied to all grants—and then, perhaps, customized on a per-grant basis.

Once they are set up, you can track which requirements are upcoming, completed, or sometimes even "approved"—to note, for instance, that a progress report was read by your staff and approved.

Some systems allow you to set up automatic email reminders that alert staff members or grantees when requirement deadlines are approaching. Some let grantees log in to a website to see approaching deadlines online.

If you require written progress reports from grantees, make sure the system provides the ability to affiliate those reports with the grantee. Can you attach a document to the grant record? Can you enter specific information as data fields on the record—for example, the number of people served by the grant? If you can enter data fields, can this information then be used in reports that summarize metrics across all grantees—for example, to know that your grantees collectively provided food to 4,523 children in 2013? What about comparing metrics across groups that you can configure in the system?

A number of systems use online forms to collect these types of detailed data fields, including narrative information, quantitative metrics, or even detailed budget information. If you plan to collect data online, consider how easily you can update the forms. Can you customize them yourself, or will you have to pay the vendor for each change? Can you use the collected data in summary reports?

Payments

Once you approve a grant, you will need to manage the payment process. Grants management systems can help with this as well.

In many software packages, setting up a payment schedule for a grant mimics the process of setting up grant requirements. Some require you to schedule each payment manually, or automatically default to paying the entire grant in a single lump sum on the established grant start date. Others allow you to set one or more default payment schedules, which you can then assign to a grant—for example, to say that every grant within a particular program is a three-year grant with a payment on the first of each year. Some systems also offer a payment scheduling "wizard," which lets you, for example, define four evenly spaced payments over four years. However you initially define payment schedules, it's useful to be able to then manually adjust them to specific circumstances for a particular grant.

Grantmakers often tie payments to specific grantee requirements—for example, a second payment may be contingent on the receipt of a progress report. To support this, make sure the grants management system allows you to link payment to requirements, and that it uses this information to generate payment reports.

Systems vary in their support for payment special cases. Is it straightforward to award grants to one organization but pay another, such as a fiscal sponsor? Are you able to update the amount of a grant in the middle of a grant period to account for unforeseen events without losing the record of the approved grant amount? Can you make grants in currencies other than U.S. dollars, or in multiple currencies—and if so, will the system track the exchange rate not just at the time of grant approval but at the time of payment? Can you report on grants made in other currencies, including exchange rate data, and do payment reports carry program codes and other meaningful information?

If your organization requires paper check requests for accounting, make sure the system supports them—some can even be configured to print checks directly from the system. Alternatively, consider more streamlined ways to generate grantee payments. Many systems store wire transfer information and can facilitate electronic grant payments. Whichever method you use, make sure you can store payment information, such as date paid, check number, and amount, within the grants management system itself, where it's easily accessible. Can you void payments in the system, place them on hold, and track sophisticated transactions like quid pro quo and in kind payments?

Many grants management systems integrate with external accounting systems like QuickBooks or Great Plains (now Dynamics GP). Such integration can streamline the payment process by transferring information about upcoming payments into the accounting system and then retrieving data on payments that have been made. Vendors of packages with no accounting system integration are often willing to custom build this facility for an additional cost.

Finally, most grantmakers will want to control who has access to payment information. Most of the systems in this report allow you to restrict access to payment information through permissions, and according to payment status.

Budgeting

There is wide variance among grants management systems in support for budgeting. A few offer no budget support at all, while some others allow budgeting only through heavy customization. There are some packages, however, that include strong budgeting components. Most commonly, budgeting features let you define the amount of money you plan to devote to each grant program or category, and then generate reports to compare these budget amounts to the amount spent. More versatile systems allow you to track by both program and subprogram, or split grants between programs.

The ability to base budgeting on a previous year's budget can save time and effort for many organizations. Several packages we reviewed allow this, and some even allow you to create budgets for multiple years.

> **When looking at budget functionality, it's critical to understand what tracking method the system is using.**

When looking at budget functionality, it's critical to understand what tracking method the system is using. Foundations budget by one of two different methods: by the amount paid out to grantees over that year (common among corporate and community foundations, and sometimes called a cash method of budgeting) or by the amount awarded that year regardless of when it is paid (common among private foundations, and sometimes called an accrual method of budgeting). None of the systems reviewed tracked budget figures for both these methods at the same time, although some let you choose one or the other.

A number of grantmakers expressed interest in tracking budgets across multiple categories—for example, program, geography, and population—and "what if" scenario planning to see how a certain course of action would affect budgets. A few of the packages in this report provide some support for building "what if" scenarios. Another specialized need is support for interest repayments on Program-Related Investments, or PRIs, which a few systems could accommodate through customization.

System Reporting

System reports can help manage grants processes and provide updates to others. At a minimum, you should be able to create the basic reports you need for your grantmaking processes—for example, the amount of money committed and paid for the year, sorted by program, or grant details required for a Form 990 PF (Return of Private Foundation). Such basic reports are considered standard, and most software packages provide for them out of the box. The ability to customize these reports to better meet your needs and save those customizations for future use can save a lot of time and money, but not all systems allow this. Also, many of the systems that do provide standard reports and queries provide a lot of them. Is there some way to customize or filter the list to bookmark your preferred reports? A growing trend in the sector is opening up reporting access to casual users of the grants management system, not just experts. We evaluated the approachability of the reporting interface for the first time in this report.

Support for such ad hoc reports varies widely among grants management software packages. Do they include the data you'll need? Can you figure out how to use them?

From time to time you may want more customized reports. Support for such ad hoc reports varies widely among grants management software packages. Make sure you have access to all the data that might be useful in such a report, including any custom fields you've defined and information submitted in grant applications or progress reports. For simple ad hoc reports, the ability to export this data to Excel, where you can format it, might suffice. But for more complex reports, some systems provide a set of tools that let you define the data you'd like to see, as well as report columns and formatting. Some of these tools are basic, and allow limited support for customizing reports. Others are limited only by your ability to apply them—reporting tools are complex, and can be confusing to users without experience managing databases. Look carefully at the features to judge whether someone on your staff will be able to effectively create reports. Also, make sure you can save a report format once you've invested time in creating it.

Reporting abilities in grants management systems are becoming more sophisticated, and many now offer the ability to automatically run reports and send them out at intervals you set, either to you or individuals you define, as well as to present information in visual forms like charts, graphs, and maps. Some systems also contain standard report templates, like the eGrant and hGrants format from the Foundation Center, or the International Aid Transparency Initiative (IATI) standard. Dashboards are also becoming increasingly important, and some systems allow users to configure their own dynamic views of data.

Document management systems and newer versions of operating systems like Microsoft Windows allow you to search within documents. Those who have used this feature and find it helpful may wish for the ability to search the content of attachments to grant records.

Finally, if your organization categorizes grants using hierarchical codes, make sure the system supports it—for example, will it associate Pre-K and Elementary codes with Education? Not all systems offer this advanced feature.

Permissions and Workflow

If multiple staff members will use the system, make sure you can set different levels of access. This will help protect critical data by limiting who can update it.

Many systems support varied access to individual features—for example, some users can read but not update any information, or update grant information but not approve grants or change their amounts. The granularity of these access rights varies widely among systems. Some provide for a few different, preset roles. Others allow you to define read/update/delete rights for each module. A few even allow you to define rights for each individual data field.

In many cases, disabling functionality or features for a particular user or group doesn't remove it from their view. Users with read-only access may still have to navigate through disabled screens or fields to reach the information they need. Systems that provide simplified interfaces to improve ease of access for simple tasks or for users with less complex needs, such as reviewers, might be a better option for larger foundations with wider pools of users.

Audit logs—a record of who made updates to what fields, and when—can also be useful. If a system includes an audit log, check to see what actions are logged. Is it every change, or just a few core ones?

The grants management process often is a series of tasks which need to be done by specific people, in a particular order. Because of this, an increasing number of foundations want a system that manages the workflow—for example, assigning grants or tasks to individuals or roles and providing a customized view that spells those tasks out for each staff member. Systems that support configurable workflows can simplify grants management for organizations with entrenched processes.

Data Access

Whether your system is hosted (Software-as-a-Service) or installed, the grants data it contains is yours. You should be able to access it at will. Being able to extract your data from the system is critical in order to back it up—always a good idea—or to migrate it to a new grants management system. If your system is hosted on the vendor's servers, make sure the vendor guarantees specifically that you will be able to fully export all grant data and all attached files on request. Systems that allow you to do this yourself, without relying on the vendor, are even better.

Easy data access can also allow you to interact with your data through other systems—for example, to export grants data to a website as a text file, or to Excel for sorting, calculating, and formatting more sophisticated reports. The ability to import files is also helpful—for example, to manually load information from an external accounting system.

If you want a system to integrate with other software packages, such as QuickBooks or Crystal Reports, so that data flows from one system to the next without manual intervention, check to see how the connection is configured. Is an Application Programming Interface (API) or ODBC database connection provided so your own programmer can configure it? What data can be accessed this way? Is it read only, or can you write to the database? Or does the vendor have to set up any integration with external packages for you—often at extra cost?

If you want a system to integrate with other software packages, such as QuickBooks or Crystal Reports, check to see how the connection is configured.

As mobile devices grow in popularity, users look increasingly to work from their smartphones and tablet computers. While many web-based applications are accessible via smartphone web browsers, their screen size can make it impractical to use them unless the vendor either provides a view optimized for mobile browsers or builds a compact smartphone application, or "app," to facilitate access. Using a web-based grants management system from tablet computers can be practical without a specialized app or mobile view given their larger screen size relative to smartphones. Mobile device access is still new territory so it pays to get detailed information from the vendor if this is something that interests you. We also asked about ways in which vendors protect the security and integrity of your data within the system.

Completely customized systems can be useful for organizations with unique needs, but they can be very expensive, and more difficult to support down the road.

Overall Customization

Most grants management systems are designed to appeal to the broadest spectrum of users possible, taking into account that large foundations, for example, will have different needs and processes than small, private foundations. To this end, most systems let you customize the programs and codes you use to categorize grants. Systems that support online applications, reviews, and progress reports also let you customize the fields collected within these online forms—although some require a fee to the vendor to update them.

But the differences among the systems become more apparent when you begin to consider their ability to add custom "internal tracking" fields—fields used by staff rather than the online data fields used to gather grantee information. A few systems don't let you add any new internal use fields. Others let you add fields, but only into a limited "custom field" area, which can become disorganized and awkward if you add a number of fields. Check to see if you can remove fields or change the names of existing ones, and if custom fields have the same permissions as system-generated ones.

If you want to capture specific application or progress report information from grantees, check to see where the system will store it. Some provide useful views of this information. Others dump it into that same disorganized "custom field" area, forcing you to set up custom reports to view it effectively. Grantmakers who serve international or ethnically diverse populations may also be interested in a system's ability to support custom language sets for online forms, based on program or geographic location.

A few systems can be almost completely customized to your needs, with custom fields, labels, interfaces, processes, and functionality, but they require the vendor's involvement in the customization. This can be useful for organizations with unique needs, but it can be very expensive and more difficult to support down the road. Before you pay to customize a system to your existing process, revisit the processes to see if they can be streamlined or improved. Are they truly unique? Or would you be better served by moving toward the best processes used by a number of foundations, and therefore easier and cheaper to support? If you choose to have the vendor customize the system, make sure they are experienced with this type of work. Does the vendor allow heavily customized systems to remain on the upgrade path?

Ease of Use

All grants management systems are fairly complex, so your staff is likely to require training. However, functionality should be relatively easily to learn and to remember. Are fields and functions intuitively named and easy to find? If staff need cheat sheets or guesswork to run basic processes, they're more likely to opt out of using the system, or to resort to workarounds. Can users easily find the actions they need to take without returning to a main menu? The system should also effectively support power users—those most familiar with the system. Can your grant administrator perform common tasks quickly and efficiently?

Support and Training

Whatever else you need in a grants management system, you can be sure you'll need customer support. All the reviewed vendors offered solid, basic-level support: phone support, system documentation, and at least informal training upon request.

In terms of phone support, the difference is likely to be on price and quality. How much do you have to pay, either per incident or per year? Are existing

It's important to know what hardware and software will be required to use the system you choose.

customers typically able to reach someone knowledgeable when they call for support? Online support is also increasingly common, including videos, FAQs, chat support, and other web-based support for technical issues.

Good documentation, whether printed or online, is also critical. Ideally, information is available in the form of hypertext within the system—for example, to let you see what clicking a button will do before you actually click it. If you're rolling out a system to a number of people in your organization, can you tailor the documentation to your own processes?

Different vendors provide different types of training, from affordable over-the-phone and online options to more formal training at your own offices. Do they have training materials? How much will you pay for each of these training options?

Installation and Maintenance

It is important to know what will be required to use the system you choose. For most online hosted systems, a major web browser and enough internet bandwith is likely all you need. For installed systems and for web-based systems you host yourself, there can be many other requirements. You will want to know what kind of server hardware you will need. Additionally, there will likely be software prerequisites, like web server software and a core database like SQL or Microsoft Access. Will the vendor help with setup and maintenance? If not, then you might need to hire a consultant to assist you.

Stability in the Market

Finally, consider vendor stability. Choosing a grants management software package and moving your data into it is a considerable effort. You don't want to be forced to repeat this work in a year because a vendor has gone out of business. Ask some background questions. How long have they been in business? How many clients do they have? Does the revenue earned from the grantmaking system cover the personnel and operational expenses required to support it?

Because the grants management market supports niche software solutions, 20 or so clients are often sufficient for a vendor to support operations. But if they have fewer than 10 clients or so, or if their revenues don't cover their expenses, the vendor is likely not yet at a very stable point, and their long-term viability is more of a risk.

Specialized Needs

This report focuses on the core grants management functions shared by most foundations, but some grants management systems provide a number of additional functions typically focused on the more niche needs of particular types of foundations. As we've discussed, this report doesn't cover functionality specifically intended for community foundations (like fund development, full fund accounting, or donor portals), but corporate foundations have their own set of needs.

For instance, corporations often want matching gift functionality to track employees' charitable donations and the corporation's possible grants. Matching gift functionality tracks donations by employee, as most corporations will only match a finite per-employee amount. In addition, some corporate philanthropy arms count employee volunteer hours as community contributions. Many foundations use separate systems to track this, but a few grants management systems offer integrated volunteer hour tracking.

WHAT DO THESE SYSTEMS COST?

Prices for grants management systems vary widely, but follow three primary models:

- **License and maintenance fees**. Most installed software packages charge a per-user up-front fee for purchase and installation, anything from a few thousand dollars to hundreds of thousands. Many offer an à-la-carte menu of optional modules that can substantially affect the license cost. In addition, there's typically an annual "maintenance" fee, generally 15 percent to 20 percent, which covers phone support and software updates. The maintenance fee is often optional, but skip it at your own risk—phone support is important, and without updates your software will become out-of-sync with the vendor's latest version, making it difficult (and likely expensive) to purchase add-on modules in the future.

In general, installed software packages cost more up front than similar hosted online packages, but are less expensive in terms of ongoing vendor fees.

- Yearly fees. As opposed to license or maintenance fees, some systems—including most hosted systems—charge an annual fee. This fee is often scaled to usage, and is likely to be based on some combination of number of system users, how many grants applications you accept, how many documents you store, and how many programs (with separate system processes) you run. A few systems define this yearly fee based on the amount of assets you are administrating within the system, rather than your actual system use.
- Setup and configuration costs. Most vendors charge setup and configuration fees. Some vendors' pricing structures are simple, charging specific fees for analyzing and documenting your system requirement, customization, online application building, report creation, and data migration. A few cover all these services in the base pricing structure. Others use complicated pricing schemes that let you choose exactly what services you want. Remember, whether you pay the vendor, hire a consultant, or choose to tackle setup or installation yourself, there's often a lot of work to do. Data migration in particular is a time-consuming and often underestimated task.

In general, installed software packages cost more up front than similar Online hosted packages, but are less expensive in terms of ongoing vendor fees.

The comparison charts in the next section include price estimates for each system, for both a minimal implementation of the package typical for small organizations and a complex installation for a larger organization. The "First Year" cost represents any license costs, setup costs, or fees for the first year of service. The "Yearly" cost is the recurring maintenance fee or annual fee you would expect to pay each year.

WHAT PACKAGES ARE AVAILABLE?

So, grants management systems can provide a lot of functionality. But what are the commonly used software packages? MicroEdge's GIFTS and Bromelkamp's First Pearl have been around for decades and each has a large client base. A newer, lower-cost entry on the marketplace, Foundant Grant Lifecycle Manager, now has more than 500 clients. While there has long been a list of alternatives to these products, you will see in this report strong new systems on the market that promise to make the grants management system space more competitive than ever.

The number of clients a vendor has can be a useful indicator of the popularity of the package among your peers. It can also give you an idea of the size of the user community you'll find. But it's not necessarily a good way to gauge either quality or vendor stability, as a number of packages with small user bases also have a strong and comparatively affordable set of features. And while it's always important to consider a vendor's background and financial stability when choosing mission-critical software, a number of smaller vendors have shown that a solid base of just 15 or 20 customers using a packaged system can allow a company to serve clients effectively without financial difficulties.

It makes sense to think through what types of packages might work for you before considering specific systems.

THE STATE OF THE GRANTS MANAGEMENT SYSTEM MARKETPLACE

How do the available packages compare? Below, you'll find summaries and comparison charts. We also took a careful look at 28 packages—you can find those detailed reviews in Appendix A.

Low Cost for Simple Needs

More functionality isn't necessarily better. If you have only a small grants program, a straightforward system with a lower price tag could provide exactly the support you need.

GIFTS Online by MicroEdge

GIFTS Online is MicroEdge's fully web-accessible, Online hosted entry into the grants management arena. GIFTS Online offers many of the strengths of the installed systems GIFTS and GIFTS Alta, including optional modules, grant information tracking, mail-merging, and application review. As with the new GIFTS Alta interface, the GIFTS Online platform benefits from the considerable work MicroEdge has done to refine the user experience. GIFTS Online can offer customized views per user and per role, including customizable user dashboards. You can also customize your own online forms, which is new since we last saw the system. An entry level client could acquire GIFTS Online for about $5,500 per year. A very large client could pay $42,477 per year.

Akoya.net by Bromelkamp

Akoya.net, Bromelkamp's online grants management system built on Microsoft's Dynamics CRM platform, provides solid mid-level functionality for a great price. Akoya.net leverages its Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, Pearl, Akoya.net relies on Bromelkamp's eGrant.net module for online data collection and grants review. Dynamics CRM makes for a solid grants management platform but its interface at times can obscure Akoya.net's functionality. You are currently limited to exporting data view-by-view, but the vendor plans an automated "backup" button in a future release. Bromelkamp is open to performing custom development at additional cost for clients who need it, and there are Dynamics CRM and Akoya.net APIs available for those who want to extend the system themselves. Organizations that accept online applications connect eGrant.net to Akoya.net. Those that need to build their own online forms require Bromelkamp's eGrant.net Builder module at additional cost. A small foundation would pay about $10,080 in the first year and about $6,180 ongoing per year for Akoya.net, including the eGrant.net module. A large foundation could expect to pay $36,422 in the first year, and then $14,922 ongoing per year, again including the eGrant.net module. This pricing includes eight hours of training.

Grant Lifecycle Manager by Foundant

Foundant Grant Lifecycle Manager is a polished, friendly, and quickly growing low-cost grant management option with a strong focus on online data gathering. Easy-to-update online forms allow you to collect online grant applications, feedback from external reviews, and online progress reports from grantees. But the system still has only basic support for payments and budgeting and doesn't support branching for applications or data collection. It does not allow users to interact with data via an Application Programming Interface. It does, however, allow you to export most visible data from the system. Foundant Grant Lifecycle Manager is very reasonably priced, at $6,500 for a two-year license that includes support, and $1,500 for a one-time setup cost. The vendor also offers notably strong customer support and training options for a system of this price tier, and has an active and growing user group community.

Common Grant Application by Oceanpeak Inc.

An online hosted option, Common Grant Application by Oceanpeak Inc. provides an affordable, easy-to-use system with some interesting features—particularly for applications. For example, applicants can easily attach video and other multimedia components to their applications. The applications themselves are limited in formatting and functionality, but online applications include a helpful, well-thought-out ability for applicants to reuse information. The vendor also reports being willing to customize the system at no cost to the client and roll out those changes to all users if the new functionality is deemed useful to the user community. On the other hand, much grantmaker functionality is notably absent, and relationship management is all but nonexistent, as is support for budgeting. Common Grant Application does not handle mail-merge fields for print or email correspondence. There is some ability to track payments, but no functionality to make payments contingent on a reporting requirement. The system now supports saving a list of favorite reports for easy access, and all visible system fields can be queried and included in both standard and ad-hoc reports—for instance, reports can be configured to include just text fields. Common Grant Application calculates its pricing partially by taking into account the number of applications received in a given year. For instance, a small foundation that receives only 10 applications annually could use Common Grant Application for around $1,270 per year, while a very large foundation with 100 applications a year could expect an annual fee of about $5,500.

Grant Management System by WizeHive

WizeHive's Grant Management System offers a combination of features and affordable pricing that will make this Online hosted system an attractive option for smaller grantmakers. It is approachable, with a polished layout and collapsible side navigation menus that make it easy for users to find their way around the system. WizeHive's Grant Management System scores well in grant tracking and online applications, and easily configurable grant review workflows bolster an already solid application review process. However, WizeHive's Grant Management System is less strong when it comes to creating letters or other print communication, as there is no mail-merge functionality. An organization with five users, 10 grants per year, and only light online application and review functionality could pay as little as $2,000 in the first year. An organization that receives more than 500 applications annually and requires more-robust donor management capabilities might pay closer to $7,000 per year.

ZoomGrants

ZoomGrants is a well-laid out, hosted grants management solution centered on requests for proposals (RFPs) and the grant applications submitted in response to RFPs. Grant applications support an eligibility quiz in addition to the application itself, and can include fields for post-grant reporting. The system has robust support for the application process—applicants can manage their proposals and information for all funders using the system using one account, and can carry over contact information and other data from one application to another, or from a Letter of Intent to a proposal. Only applicants, not foundation staff, can make changes to organizational information. Search functionality is basic; ZoomGrants outputs information to an onscreen report and then requires foundation staff to rely on their browser's search functionality to hone in on what they need. Merge fields are supported for emails, but not for printed correspondence, which must be produced by exporting system data to a CSV file to be merged with Microsoft Word. A foundation with one RFP or grantmaking program could pay as little as $1,495 per year for ZoomGrants. Each additional grantmaking program adds $1,495 annually.

PowerOFFICE

PowerOFFICE is a solid, well-rounded system with particularly strong features around relationship and contact management. Built on IBM Notes Domino, the system can be installed on your organization's server, or hosted on the vendor's servers. PowerOFFICE is fairly strong in both print and email communication, although delivery statistics for broadcast email are only available through customization by the vendor. The system provides relationship and contact management through the PowerPEOPLE module, which allows users to track all the communication they've had with individuals and associate multiple contacts to organizations and grants. The online application process is straightforward—the vendor will create application forms for you, but applicants cannot save incomplete applications to finish later before submitting, and neither can they view or print submitted applications without customization. A small foundation that receives only 10 applications annually could expect to pay about $3,000 per year for a hosted version of the system, plus a one-time setup fee for online applications starting at around $4,000, or a one-time cost of $6,000 to install the system on your own server, plus annual fees of $1,600 and the setup fee for online applications. For larger foundations which receive around 100 applications annually, the system would be $6,600 per year hosted (plus setup fee) or $12,000 for installed (with an annual fee of $2,000).

DonationXchange

This online hosted system, specializing in corporate and private foundations, provides well-rounded functionality. DonationXchange has solid application review features, and online application forms are flexible, with the option to embed the forms directly in a webpage, but support for online applicants is not as strong as in other systems reviewed in this report. Budgeting in the system is mostly solid, and an integration with QuickBooks provides strong functionality for tracking payments. While the system provides decent email capabilities, support for letters and other print communication is rather basic. A smaller foundation with five users dealing with only 10 grants a year could get up and running in the system for about $10,000; larger foundations dealing with 100 grants or more per year and 10 concurrent users could expect to pay $40,000 or more in the first year.

GrantMaker by Closerware

Closerware's GrantMaker offers solid and affordable grant and application tracking features with reasonable support for online forms. Online application forms can be extensively formatted with a variety of field types, and the resulting applications and grants can be easily coded and searched. A variety of application-scoring options with the ability to summarize and report on numerical review scores add to GrantMaker's generally strong application review functionality. Lack of any substantial payment tracking functionality and budget support will disappoint some organizations, as will relatively weak email capabilities. GrantMaker licenses start at $600 per user annually, with volume discounts for five licenses and up. There is a one-time setup fee of $500.

Flexible Relationship Management

If you are hoping to track not just the basic details of a grant, but complex custom tracking information about applications and relationships, consider the growing number of systems geared to support this need with customizable options and strong support for relationship management.

Good Done Great's Grant Management System

Good Done Great's Grant Management System has undergone significant changes in the past couple of years, including a migration from Intuit's QuickBase platform to its own proprietary backend infrastructure. It remains an affordable hosted solution with strong functionality. Online forms built in Grant Management System can be matched to the look and feel of an organization's website. Facilitated by an intuitive navigation scheme, information collected online can easily be managed, viewed, and reported on by grants administrators. Letter and email templates can be custom-formatted to organizational standards, and can contain mail-merge fields, which helps with large mailings. Improvements include support for multiple currencies and email delivery statistics. A small foundation would pay about

$10,000 for implementation of the system, and about $11,800 each year, which includes basic training. A larger foundation would pay around $28,500 for implementation, and $42,870 each year, which would include custom, on-site training.

EasyMatch by JK Group

JK Group's EasyMatch provides outsourced foundation-operation management services, specializing in corporation foundations. Each system is custom built, with online application forms, online progress reports, workflow, and viewing screens all tailored to the client's needs. The core system supports matching gifts and volunteer programs, and has solid budgeting functionality. Relationship management features are strong, as is support for producing mail-merged letters and board dockets. A new self-service reporting tool adds more functionality and flexibility for ad hoc reporting and saving favorite reports. The vendor still performs most customization for clients, including for online application and progress report forms, although a forthcoming release is designed to provide users with more ability to do some of this work themselves. JK Group's grants management solution typically costs between $8,000 and $17,500 to set up, and from $10,000 to $20,000 annually, including support and maintenance.

GMS360° by SmartSimple

SmartSimple's GMS360° has undergone a major user experience redesign which complements its power and flexibility with greater ease of use. This system lets you create relatively complex online forms that can contain a wide variety of field types, including rich text fields with formatting toolbars and internal tracking fields that can be made invisible to applicants. Uploaded files can be version-controlled and indexed, making their contents available to queries and reports. The system provides useful support for managing relationships, broadcast email, mail-merged letters, and reporting, as well as integrated task lists and dashboards to manage each user's work. Payment functionality and budgeting are particularly strong, with support for payment workflows and multiple currencies. GMS360° implementation starts at about $20,000. Annual support and maintenance are included in monthly user fees. "High usage" staffers, such as grants administrators and program officers who use the system more than 40 hours a month, are billed at $1,176 per user per year (billed on a montly basis). "Low usage" staffers, who are logged into the system for less than 40 hours per month, are billed at $180 per year (again on a monthly basis). External users, like reviewers or board members, are billed annually at $2,400 total (on a monthly basis). License fees are based on actual usage, and the system automatically audits the user type for fair billing.

FoundationConnect by NPower

FoundationConnect is an online hosted solution built on top of the Salesforce platform. The vendor, NPower, is a grantseeking nonprofit. The system capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers and management to see only the information relevant to them. Grantees and external reviewers log in through a separate, but tightly integrated, portal application. Users will want to visit the Salesforce AppExchange to add Conga Composer or LOOP Document Services for mail-merge and template capability. Email sent from FoundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but is limited to 500 emails per day. Many broadcast email programs, like Vertical Response and Team Approach, also integrate tightly with Salesforce. A free connector lets users log email sent from Outlook and synchronizes their Outlook contacts with the system. The initial license cost for FoundationConnect ranges from $25,000 for small foundations to $40,000 for larger foundations, with maintenance and support ranging from $7,200 to $14,400 and up per year. The Salesforce license is free for nonprofits for up to 10 user licenses, and costs $360 per license per year on top of that.

Fluxx

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as "dashboards" containing frequently viewed information. These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system, and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has also added some new capabilities, such as batch update functionality, in-system support for Google Drive attachments, integration with several accounting packages, and robust OFAC checking. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Those fees range from implementation fees of between $15,000 and $30,000 and ongoing annual fees of between $7,000 and $12,000 for small foundations up to implentation fees over $100,000 and annual fees of between $25,000 and $85,000 for large foundations.

GIFTS Alta by MicroEdge

Beginning in 2011, MicroEdge has debuted a new user interface and set of functionality for the installed package called GIFTS Alta, which draws on the infrastructure of the very popular GIFTS but adds more functionality in terms of system personalization, dashboards, and workflow management. The vendor reports that GIFTS is and will continue to be supported, but that new clients looking to implement an installed system will purchase GIFTS Alta. (See our review of GIFTS on p. 184. For a hosted option, the vendor also offers GIFTS Online, reviewed on p. 202.) GIFTS Alta still relies on some modules at additional cost to extend its capabilities, like IGAM for online grant applications and reporting and ReviewerConnect to collect and track reviewer data, but has incorporated some key processes into the base product, like Microsoft Office integration and batch updates. GIFTS Alta shares its predecessor's strong internal tracking features, like the ability to create printed letters, categorize with codes, and track payments. The new version of the product also allows foundation staffers to create unique views to support their personal processes, and has a carousel view to faciliate a more visual representation of data within the system. A friendly new ad hoc reporting tool, custom workflow functionality, and customizable dashboard system also help make data more accessible throughout the system. A small foundation could expect to pay about $37,000 in the first year and then $7,320 per year for GIFTS Alta plus IGAM. A larger foundation might pay $84,000 in the first year, and then $16,800 per year for GIFTS Alta plus all pertinent modules.

Versaic Grants by Versaic

The Versaic platform is used by a number of corporate philanthropic departments to manage grantmaking, product donations, and sponsorships. Versaic Grants is a highly flexible platform built on Microsoft's .NET business application framework. The vendor provides consulting services for clients, including configuration of online forms, batch updates, and ongoing tech support for applicants and grantees. Reporting is very strong in the system, and it has powerful internal workflows that can help segment applications based on programs and automatically rout them to the right staffers. There's no OFAC checking in the system at this point, and you can't see email delivery statistics. The Versaic Grants solution can be implemented for $10,000 and up, with subscription fees of $10,000 and up per year for small foundations. For larger foundations, the vendor quoted a minimum implementation cost of $20,000, with annual subscription fees starting at $15,000.

Also consider Bromelkamp's Akoya.net, listed above under "Low Cost for Simple Needs."

Complex Online Data Collection

If your core priority in a grants management system is to collect complex application and grantee progress report data online, a number of systems provide both strong online support and useful general grants management functionality.

Altum proposalCENTRAL

ProposalCENTRAL is an interesting mid-market software package focused on health and biomedical research grantmakers. It is very strong in some areas—for example, it offers support for sophisticated online applications and some of the most powerful support for external review committees of any software package we looked at. Lack of budgeting support and weak mail-merge facility for printed letters, however, may make it less appealing to some organizations. A technical feel and suboptimal layout makes the system harder to learn than many others. The system starts at about $18,000 per year for small foundations, and scales up through $100,000 per year or more for very large foundations with complex processes.

CyberGrants

CyberGrants offers a highly configurable online hosted solution with a particularly strong base of corporate foundation clients.The system has an easy-to-navigate interface and very solid online data gathering capabilities—for example, online support for eligibility quizzes, proposals and progress reports—and administrative tracking features, such as the ability to update application information at any time, to attach internal use and coding fields to applications, and to create mail-merged letters. Internal tax status and OFAC checking is quite robust, and the system benefits from a user-friendly ad hoc reporting engine. The system lacks an internal communication log, though, and the fact that every reviewer must have at least a limited license to access the system means it may not be the best solution for foundations who use many external reviewers. The system also has substantial ability to develop custom functionality to complement its standard features. CyberGrants has two licensing levels, both of which include all modules, support, and maintenance. Small foundations with 5 users might pay in the range of $11, 000 per year, and larger foundations could pay closer to $82, 500 with 20 named users and 15 reviewers.

GEMS from Mosaic

Mosaic's suite of software—which includes GEMS, STARS, and other customized implementations—is designed to support many facets of the human services sector besides grants management, and provides powerful cabilities in the realm of grant evaluation and contract-based budgeting. The system is used predominantly by government agencies throughout the United States, and in 29 countries in the developing world. The vendor provides consulting services and highly customized implementations for its customers to help connect grants and improved outcomes with an organization's grantees. The software has a unique means of personalizing the interface, and it's easy to turn features and whole areas of the system on and off. Online application and progress report features are strong, although it's not as streamlined as other systems in facilitating the viewing and printing of applications and attachments for reviewers. The system does not include a means of checking tax or OFAC status, although the vendor is willing to add such features during implementation. There's some facility to send messages within the system, but not to support letters or email merges. However, most data is exportable to Excel, and the system's powerful reporting capabilities are a plus. Support options—both online and phone—are also quite extensive. The vendor reports that pricing is determined based on the specific size and needs of the organization in question. For a small foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $32,000, with a lower ongoing annual cost for maintenance and support. For a larger foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $155,000, with a lower ongoing annual cost for maintenance and support.

GrantRight by GrantStream

Aimed primarily at corporate foundations, GrantRight is an Online hosted option with a web-based interface. It has a particular strength in internal grant tracking, payments, and budgeting features. However, it's somewhat limited in online application and progress reporting. For instance, it can only support an eligibility quiz and one other application phase, and does not offer any ability to track data from grantee progress reports without additional customization. Nearly anything is customizable—including sophisticated application review workflows and forms—but almost all customization must be done by the vendor, potentially at additional cost, including customizing values in dropdown boxes and creating letter and grant summary templates. Ad hoc reports are flexible and easy to format. Standard reports can be easily modified by those familiar with SAP Crystal Reports. GrantStream has extensive experience with corporate clients and is willing to heavily customize GrantRight, which could make it attractive to corporate foundations with specialized needs. Annual recurring costs for GrantRight can be between $19,200 and $25,000, with first year setup fees generally starting around $30,000 to $34,000.

PhilanTrack by Philantech

PhilanTrack is an Online hosted option that prioritizes the user experience for both grantseekers and grantmakers. It provides solid support for tracking applications and grants, and for producing letters and board dockets. The online application interface allows grantseekers to use the system as their own grant language repository, with the ability to search for and reuse language they've used on past grants. Grantmakers will find PhilanTrack simple to navigate, though at the time of this review search functionality is tied to specific areas of the system, meaning you have to know the tab in which the subject of your search is located in order to find it. PhilanTrack's relationship-management facility is somewhat limited, with only basic support for tracking communications with grantees—you can keep a call log on a grantee record, but emails generated within the system must be added manually. And while the system can generate automatic emails based on a number of action-triggers, there's no way to easily define parent/child relationships for organizations in the system. PhilanTrack's pricing starts at $4,000 annually with another $4,000 in first-year setup costs.

Also consider JK Group's EasyMatch, CyberGrants, Good Done Great's Grants Management System, and GMS360° by SmartSimple, listed above in "Flexible Relationship Management."

Complex Application Review Needs

Some systems provide very little functionality to support complex review processes, while these provide complex scoring mechanisms, online forms to allow outside reviewers to weigh in, and even specialized functionality geared toward reviewing arts projects or medical research applications.

Altum EasyGrants

Easygrants combines sophisticated functionality with the ability to customize in depth not only all online applications, review forms, and grantee reports, but all workflow and tasks required for each program—including who should do which task, and when. Each user is presented with an easy-to-parse list of upcoming tasks assigned to them in a portal-like format; they can also search the system or perform bulk processes like send emails, print letters, or create reports. The system does not, however, easily support branching online forms. The system excels in its support for complex, online review processes, and is also good with mail-merged letters and automatic email reminders. The system can be hosted by Altum, but is often installed on grantmakers' own web servers. A mid-sized organization might expect to pay about $75,000 to $100,000 in first-year licensing costs, plus $50,000 to $200,000 or more for initial setup and configuration.

First Pearl by Bromelkamp

First Pearl is a traditional installed software package built in Microsoft Access, which is both a strength and a weakness. On one hand, Access includes a solid report builder, is strong in data tracking, and provides a flexible database platform—which Bromelkamp leverages to tailor First Pearl to each client's needs, including adding fields or features to support unique processes. Someone with Access development experience can extend First Pearl's functionality themselves with minimal or no vendor assistance. On the other hand, Access has limitations in user interface design options, which manifests in First Pearl through screens that, while feature-rich, can feel crowded and hard to navigate. Access also lacks field-level security, but for clients concerned about this, Bromelkamp is able to effectively resolve the issue through creative use of custom secure database tables, and can leverage user permissions to protect or hide dynamically (by user or even by data condition). Also, an MSSQL version of First Pearl is available, and provides field-level security. Organizations that accept online applications connect eGrant.net to First Pearl. Those that need to build their own online forms require Bromelkamp's eGrant.net Builder module at additional cost. A small foundation could expect to pay around $17,430 for the first year (including eGrant.net) and $1,800 in annual recurring costs. A large foundation could expect to pay closer to $43,492 in the first year (including eGrant.net), and $7,242 in annual recurring costs.

GrantsOnline™ by WESTAF

Designed as the successor to CultureGrants Online™, WESTAF's GrantsOnline™ (GO for short) was built by grantmakers for use by the sector. In addition to traditional grants management functionality, GrantsOnline™ has some unusual features likely to be of interest to arts funders, such as the ability for applicants to submit videos in support of their applications. Conveniently, the videos stream rather than download, although files are converted to the Flash format, which isn't well supported on iOS devices like iPads. While generally strong in internal tracking, the system has a comparatively limited ability to track grants easily by categories and codes. Dynamic fields allow you to build powerful online forms with more intricate branching logic than you'll find in most other systems. Application review and email capabilities are similarly strong. During implementation, clients can select from a menu of options for grant-payment functionality that can be included—possibly, for an additional implementation cost. While reporting facilities are powerful and flexible, there's no ability to see a list of favorite reports. Pricing for GrantsOnline™ has three tiers and starts at $4,450 in annual license fees for five grant programs and up to 500 users with a first-year setup fee of $7,550. Media storage per user above 100MB is available at additional cost.

WebGrants by Dulles Technology

WebGrants is a well-designed, mid-market online package with support for the full grant lifecycle. Users can define sophisticated online application forms, review forms, and grantee report forms to collect extensive information. However, there's no support for forms that can branch based on form entries. The system also allows you to build your own custom application review forms for internal or external use. Ad hoc reporting capabilities are strong, and the system provides useful internal tracking functionality, but administrators can only search on a limited number of fields. Some standard reports are available, or data can be analyzed with the included Jasper Reports engine. Letter templates can be set up with merged data fields. The system is typically licensed as a one-time fee for unlimited use, and then installed on the user's internet servers. The license fee is typically between $15,000 and $45,000, depending on what modules are purchased.

Altum proposalCENTRAL

ProposalCENTRAL is an interesting mid-market software package focused on health and biomedical research grantmakers. It is very strong in some areas—for example, it offers support for sophisticated online applications and some of the most powerful support for external review committees of any software package we looked at. Lack of budgeting support and weak mail-merge facility for printed letters, however, may make it less appealing to some organizations. A technical feel and suboptimal layout make the system harder to learn than many others. The system starts at about $10,000 per year for small foundations, and scales up through $100,000 per year or more for very large foundations with complex processes.

Also consider Fluxx, Versaic Grants, CyberGrants, and MOSAIC GEMS.

Substantial Functionality for the Needs of Large Foundations

If you need all of the above—and are willing to pay for it—these large "enterprise" systems provide strong functionality and customization for a larger price tag. Many systems in other categories can also be customized to fit the needs of large foundations.

Fusion Labs GE/Spectrum

Fusion Labs GE/Spectrum is a standalone system that includes several facets, including the GrantedGE grants management system and either the PROFFER

4 online application management, which integrates with Blackbaud's NetCommunity, or the Spectrum online web portal for those who choose not to use NetCommunity. The system can integrate tightly with other Blackbaud products, too, such as The Raiser's Edge and The Financial Edge. However, unlike the earlier GrantedGE system, those external products are not required for GE/Spectrum. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Labs' online form modules support reasonably sophisticated formatting of forms. The system now includes application branching, more sophisticated eligibility quizzes, and support for multiple logons for applicants from a single organization. License costs range from around $20,000 to $225,000, based on the size of the foundation and complexity of the implementation.

Also consider Altum EasyGrants, GrantStream's GrantRight, Fluxx, MicroEdge's GIFTS, and MicroEdge's GIFTS Alta.

COMPARING THE SYSTEMS

As part of this research, we reviewed 28 grants management software packages in detail to determine how they compared in a number of critical areas. The following charts compare these packages on a set of specific criteria. While every grant-maker will base software decisions on a different set of factors, these charts help by explaining the various packages' strengths and weaknesses in areas important to most foundations.

The detailed write-ups of the 28 systems begin on page 41. The framework used to determine the ratings is included in Appendix B.

LOW COST FOR SIMPLE NEEDS

	Microedge GIFTS Online	Bromelkamp Akoya.net [with eGrants.net module]	Foundant Grant Lifecycle Manager	Oceanpeak, Inc Common Grant Application	WizeHive Grant Manager	ZoomGrants	PowerOFFICE	Donation Xchange	Closerware GrantMaker
Small Grantmaker, basic functionality***									
First year cost	$5,500	$10,080	$4,750	$1,270	$2,000	$4,385	$7000-10,000	$10,000	$3,500
Ongoing yearly cost	$5,500	$6,180	$3,250	$1,270	$2,000	$3,990	$1600-$2000	$5,000	$3,000
Large Grantmaker, basic functionality***									
First year cost	$42,500	$36,400	$4,750	$5,500	$7,000	$10,365	$10,000-$16,000	$40000 and up	$12,500
Ongoing yearly cost	$42,500	$14,900	$3,250	$5,500	$7,000	$9,970	$1,600-$2,000	$20,000 and up	$12,000
Internal Tracking	Advanced	Solid	Solid	Solid	Advanced	Basic	Solid	Solid	Basic
Online Applications–for Grantmakers	Solid *	Solid	Basic	Basic	Basic	Basic	Basic	Basic	Basic
Online Applications–for Grantseekers	Solid *	Solid	Solid	Solid	Solid	Advanced	None	Basic	Basic
Form Design and Flexibility	Basic	Solid	Solid	Solid	Solid	None	None	Basic	Solid
Applications Review	Solid	Advanced	Solid	Solid	Advanced	Basic	Solid	Basic	Basic
501(c)(3) and OFAC Status	Advanced	Solid	Solid	Solid	Basic	None	None	Solid	None
Letters & Board Dockets	Advanced	Solid	Advanced	Solid	Basic	Basic	Solid	Solid	Solid
Emails	Solid	Solid	Solid	Basic	Solid	Solid	Solid	Solid	None
Relationship Management	Solid	Advanced	Solid	None	Basic	Basic	Basic	Solid	Basic
Grant Requirements & Evaluation	Advanced	Advanced	Solid	Basic	Solid	Solid	Basic	Solid	Basic
Payments	Solid	Solid	Basic	Basic	Solid	Solid	Solid	Solid	None
Budgeting	Solid *	Advanced *	Basic	None	Solid	Solid	Advanced	Solid	None
System Querying & Reporting	Solid	Advanced *	Solid	Solid	Solid	Basic	Solid	Solid	Solid
Permissions & Workflow	Advanced	Advanced	Solid	Basic	Advanced	Basic	Basic	Solid	Basic
Data Access	Solid	Advanced	Basic	Basic	Solid	Basic	Basic	Advanced	Basic
Overall Customization	Solid	Advanced	Solid	Basic	Solid	Solid	Solid	Solid	Solid
Ease of Use	Advanced	Solid	Solid	Advanced	Solid	Advanced	Solid	Solid	Solid
Support & Training	Advanced	Advanced	Advanced	Advanced	Solid	Advanced	Solid	Solid	Solid
Stability in the Market	Advanced	Solid	Advanced	Basic	Advanced	Solid	Solid	Advanced	Basic
Support Customer Experience	Good	Good	Outstanding	Outstanding	Outstanding	Outstanding	< 5 responses	< 5 responses	< 5 responses
Training Customer Experience	Outstanding	Good	Outstanding	Outstanding	Outstanding	Outstanding	< 5 responses	< 5 responses	< 5 responses
Implementation Customer Experience	Good	Good	Outstanding	Outstanding	Outstanding	Good	< 5 responses	< 5 responses	< 5 responses

• None Basic Solid Advanced   • < 5 responses Below Average Good Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

FLEXIBLE RELATIONSHIP MANAGEMENT

	Good Done Great Grants Management System	JK Group Easymatch	Smart Simple GMS360	NPower Foundation Connect	Fluxx	Bromelkamp Akoya.net [with eGrants. net module]	Versaic Grants	MicroEdge GIFTS Alta
Small Grantmaker, basic functionality* **								
First year cost	$21,800	$18000 and up	$17,000 - $25,000	$32,200	$15,000 - $30,000	$10,080	$10,000 and up	$36,600
Ongoing yearly cost	$11,800	$10000 and up	$7,500 - $15,000	$7,200	$7,000 - $12,000	$6,180	$10,000 and up	$7,320
Large Grantmaker, basic functionality* **								
First year cost	$71,370	$27,000 and up	$25,000 - $100,000	$61,600	$100,000 and up	$36,400	$20,000 and up	$84,000
Ongoing yearly cost	$42,870	$10,000 and up	$12,000 - $20,000	$21,600	$25,000 - $85,000	$14,900	$15,000 and up	$16,800
Internal Tracking	Advanced	Advanced	Advanced	Advanced	Advanced	Solid	Advanced **	Advanced
Online Applications–for Grantmakers	Advanced	Advanced	Advanced	Advanced	Advanced	Solid	Advanced	Solid *
Online Applications–for Grantseekers	Advanced	Advanced	Solid	Advanced	Advanced	Solid	Advanced	Solid *
Form Design and Flexibility	Advanced	Solid	Advanced	Solid	Solid	Solid	Solid	Solid
Applications Review	Advanced	Solid	Advanced	Solid *	Advanced	Advanced	Solid **	Solid
501(c)(3) and OFAC Status	Advanced	Advanced	Advanced	Advanced	Advanced	Solid	Solid	Advanced
Letters & Board Dockets	Advanced	Advanced	Advanced	Advanced *	Advanced	Solid	Advanced	Advanced
Emails	Advanced *	Solid	Advanced	Advanced *	Advanced	Solid	Solid	Solid
Relationship Management	Solid	Solid	Advanced	Advanced	Solid	Advanced	Solid **	Advanced
Grant Requirements & Evaluation	Advanced	Solid	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced *
Payments	Solid	Solid	Solid	Advanced	Advanced	Solid	Advanced **	Advanced
Budgeting	Advanced	Solid	Solid	Advanced	Advanced	Advanced *	Advanced	Solid *
System Querying & Reporting	Advanced	Solid	Advanced	Advanced	Advanced	Advanced	Solid	Solid
Permissions & Workflow	Advanced	Solid	Advanced	Advanced	Advanced	Advanced *	Advanced	Advanced *
Data Access	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Overall Customization	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced	Solid	Advanced
Ease of Use	Advanced	Advanced	Advanced	Advanced	Solid	Solid	Advanced	Advanced
Support & Training	Solid	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Stability in the Market	Advanced	Advanced	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Support Customer Experience	Below Average	< 5 responses	Good	Good	Good	Good	< 5 responses	Below Average
Training Customer Experience	Below Average	< 5 responses	Outstanding	Good	Outstanding	Good	< 5 responses	Good
Implementation Customer Experience	Below Average	< 5 responses	Below Average	Below Average	Outstanding	Good	< 5 responses	Good

• None ◎ Basic ● Solid ● Advanced

• < 5 responses ◎ Below Average ● Good ● Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

COMPLEX ONLINE DATA COLLECTION

	Altum proposal CENTRAL	MOSAIC GEMS	PhilanTech PhilanTrack	CyberGrants	Smart Simple GMS360	Good Done Great Grants Management System	GrantStream GrantRight™ - Full	JK Group Easymatch
Small Grantmaker, basic functionality* **								
First year cost	$18,000	$32,000	$8,000	$11,000 and up	$17,000 - $25,000	$21,800	$57,200	$18,000 and up
Ongoing yearly cost	varies	varies	$4,000	$11,000	$7,500 - $15,000	$11,800	$23,200	$10,000 and up
Large Grantmaker, basic functionality* **								
First year cost	$100,000	$155,000 and up	$36,000	$82,500 and up	$25,000 - $100,000	$71,370	$71,500	$27,000 and up
Ongoing yearly cost	varies	varies	$11,000	$82,500	$12,000 - $20,000	$42,870	$30,500	$10,000 and up
Internal Tracking	Basic	Solid	Solid	Advanced **	Advanced	Advanced	Advanced *	Advanced
Online Applications–for Grantmakers	Basic	Advanced **	Solid	Advanced	Advanced	Advanced	Basic	Advanced
Online Applications–for Grantseekers	Advanced	Solid	Advanced	Solid	Solid	Advanced	None	Advanced
Form Design and Flexibility	Basic	Solid	None	Solid	Advanced	Advanced	Basic	Solid
Applications Review	Basic	Advanced	Solid	Solid	Advanced	Advanced	Basic	Solid
501(c)(3) and OFAC Status	None	None	Basic	Advanced	Advanced	Advanced	Basic	Advanced
Letters & Board Dockets	Solid	None	Solid	Solid	Advanced	Advanced	Solid	Advanced
Emails	Solid	Basic	Basic	Solid	Advanced	Advanced *	Basic	Solid
Relationship Management	Basic	Basic	Basic	Basic	Advanced	Solid	Basic	Solid
Grant Requirements & Evaluation	Solid	Advanced	Solid	Basic	Advanced	Advanced	Solid *	Solid
Payments	Advanced	None	Solid	Advanced	Solid	Solid	Solid	Solid
Budgeting	None	Solid **	Basic	Solid	Advanced	Advanced	Solid	Solid
System Querying & Reporting	Solid	Solid	Solid	Advanced	Advanced	Advanced	Solid	Solid
Permissions & Workflow	Basic	Solid **	Basic	Solid	Advanced	Advanced	Solid *	Solid
Data Access	Advanced	Advanced	Advanced	Solid	Advanced	Advanced	Basic	Advanced
Overall Customization	Solid	Solid	Solid	Solid	Advanced	Advanced	Solid	Advanced
Ease of Use	Basic	Solid	Solid	Advanced	Advanced	Advanced	Solid	Advanced
Support & Training	Advanced	Advanced	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Stability in the Market	Advanced	Advanced	Solid	Advanced	Solid	Advanced	Advanced	Advanced
Support Customer Experience	< 5 responses	< 5 responses	Good	Good	Good	Below Average	< 5 responses	< 5 responses
Training Customer Experience	< 5 responses	< 5 responses	Below Average	Outstanding	Outstanding	Below Average	< 5 responses	< 5 responses
Implementation Customer Experience	< 5 responses	< 5 responses	Below Average	Below Average	Below Average	Below Average	< 5 responses	< 5 responses

• None ◯ Basic ● Solid ● Advanced   • < 5 responses ◯ Below Average ● Good ● Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

COMPLEX APPLICATION REVIEW NEEDS

	Altum EasyGrants	Bromelkamp First Pearl [with eGrants.net module]	WESTAF GrantsOnline™	Dulles Technology Partners WebGrants	FluidReview	Fluxx	Versaic Grants	CyberGrants	MOSAIC GEMS
Small Grantmaker, basic functionality***									
First year cost	not recommended for this size	$17,430	$12, 000	$10,000	$4,000 - $8,000	$15,000 - $30,000	$10,000 and up	$11, 000 and up	$32,000
Ongoing yearly cost	not recommended for this size	$1,800	$4,450	$6,000	$4,000 - $8,000	$7,000 - $12,000	$10,000 and up	$11, 000	varies
Large Grantmaker, basic functionality***									
First year cost	$75,000 - $300,000	$43,500	$33,850	$150,000	$12000- $30000	$100,000 and up	$20,000 and up	$82,500 and up	$155, 000 and up
Ongoing yearly cost	$30,000 - $50000	$7,250	$12,550	$18,000	$12000- $30000	$25,000 - $85,000	$15,000 and up	$82,500	varies
Internal Tracking	Solid	Solid	Solid	Advanced	Advanced	Advanced	Advanced **	Advanced **	Solid
Online Applications—for Grantmakers	Advanced	Solid	Advanced	Basic	Advanced	Advanced	Advanced	Advanced	Advanced **
Online Applications—for Grantseekers	Advanced	Solid	Basic	Solid	Basic	Advanced	Advanced	Solid	Solid
Form Design and Flexibility	Solid	Solid	Solid	Solid	Basic	Solid	Solid	Solid	Solid
Applications Review	Advanced	Advanced	Solid	Advanced	Advanced	Advanced	Solid **	Solid	Advanced
501(c)(3) and OFAC Status	Basic	Solid	None	None	Basic	Advanced	Solid	Advanced	None
Letters & Board Dockets	Solid	Solid	Advanced	Basic	Basic	Advanced	Advanced	Solid	None
Emails	Basic	Basic	Solid	Solid	Solid	Advanced	Solid	Solid	Basic
Relationship Management	Solid	Solid	Solid	Basic	Solid	Solid	Solid **	Basic	Basic
Grant Requirements & Evaluation	Advanced	Solid	Solid	Solid	Solid	Advanced	Advanced	Basic	Advanced
Payments	Solid	Solid	Basic	Advanced	Solid	Advanced	Advanced **	Advanced	None
Budgeting	Solid	Solid	Advanced **	Basic	Basic	Advanced	Advanced	Solid	Solid **
System Querying & Reporting	Solid	Solid	Solid	Basic	Solid	Advanced	Solid	Advanced	Solid
Permissions & Workflow	Solid	Solid	Solid	Advanced	Solid	Advanced	Advanced	Solid	Solid **
Data Access	Advanced	Advanced	Solid	Advanced	Advanced	Advanced	Advanced	Solid	Advanced
Overall Customization	Solid	Solid	Solid	Advanced	Advanced	Advanced	Solid	Solid	Solid
Ease of Use	Advanced	Basic	Advanced	Solid	Advanced	Solid	Advanced	Advanced	Solid
Support & Training	Solid	Advanced	Advanced	Advanced	Solid	Advanced	Advanced	Advanced	Advanced
Stability in the Market	Solid	Advanced	Solid	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Support Customer Experience	< 5 responses	Good	Good	Below Average	Outstanding	Good	< 5 responses	Good	< 5 responses
Training Customer Experience	< 5 responses	Good	Outstanding	Below Average	Outstanding	Outstanding	< 5 responses	Outstanding	< 5 responses
Implementation Customer Experience	< 5 responses	Good	Outstanding	Good	Outstanding	Outstanding	< 5 responses	Below Average	< 5 responses

• None ◎ Basic ● Solid ● Advanced • < 5 responses ◎ Below Average ● Good ● Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

SUBSTANTIAL FUNCTIONALITY FOR THE NEEDS OF LARGE FOUNDATIONS

	Altum EasyGrants	FusionLabs GE/Spec-trum	Fluxx	MicroEdge GIFTS Alta	MicroEdge GIFTS - Full
Small Grantmaker, basic functionality***					
First year cost	not recommended for this size	$20,000	$15,000 to $30,000	$36,600	n/a
Ongoing yearly cost	not recommended for this size	varies	$7,000 to $12,000	$7,320	n/a
Large Grantmaker, basic functionality***					
First year cost	$75,000 - $300,000	$225,000	$100,000 and up	$84,000	n/a
Ongoing yearly cost	$30,000 - $50000	varies	$25,000 to $85,000	$16,800	n/a
Internal Tracking	Solid	Solid	Advanced	Advanced	Advanced
Online Applications–for Grantmakers	Advanced	Advanced	Advanced	Solid *	Solid *
Online Applications–for Grantseekers	Advanced	Advanced	Advanced	Solid *	Solid *
Form Design and Flexibility	Solid	Advanced	Solid	Solid	Solid
Applications Review	Advanced	Advanced	Advanced	Solid	Solid
501(c)(3) and OFAC Status	Basic	Solid	Advanced	Advanced	Advanced
Letters & Board Dockets	Solid	Advanced	Advanced	Advanced	Advanced
Emails	Basic	Advanced *	Advanced	Solid	Solid
Relationship Management	Solid	Solid	Solid	Advanced	Solid
Grant Requirements & Evaluation	Advanced	Solid	Advanced	Advanced *	Advanced *
Payments	Solid	Solid	Advanced	Advanced	Advanced
Budgeting	Solid	Solid	Advanced	Solid *	Solid *
System Querying & Reporting	Solid	Solid	Advanced	Solid	Basic
Permissions & Workflow	Solid	Basic	Advanced	Advanced *	Advanced *
Data Access	Advanced	Advanced	Advanced	Advanced	Advanced
Overall Customization	Solid	Solid	Advanced	Advanced	Advanced
Ease of Use	Advanced	Solid	Solid	Advanced	Solid
Support & Training	Solid	Advanced	Advanced	Advanced	Advanced
Stability in the Market	Solid	Advanced	Advanced	Advanced	Advanced
Support Customer Experience	< 5 responses	Below Average	Good	Below Average	Below Average
Training Customer Experience	< 5 responses	Below Average	Outstanding	Good	Below Average
Implementation Customer Experience	< 5 responses	Below Average	Outstanding	Good	Good

• None Basic Solid Advanced   • < 5 responses Below Average Good Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

HOW TO DECIDE

There are a number of options in grants management software packages. That's good, but it can make choosing difficult. What questions should you ask to narrow down the choices to focus in on the packages likely to work best for you?

- **Do you need a particular type of software package**? If you want an online system that your staff can access from anywhere, you'll likely want to prioritize Online hosted options. Organizations that value control of infrastructure should consider systems that can be installed on in-house hardware.
- Do you plan to take all your applications online? More than any other criteria, the packages vary in their ability to receive applications online, and to deal gracefully with applications received in paper form. If online applications are part of your strategy, look carefully at the features offered in this area to see if they'll meet your needs, and at what price. If you plan to continue receiving at least some applications in paper, though, make sure the ability to easily get these applications into the system is high on your list of requirements.
- How sophisticated are your needs? Read through the description in this report of what grants management systems can do, and think through how much of the more-advanced functionality described is necessary for you. If the vast majority of functionality described doesn't really apply for your processes, the less-expensive and less-complex systems might work well for you. Don't assume that more functionality is better; an inexpensive and streamlined system might be just what you need. On the other hand, if you'll need a number of the functionalities described as more advanced, you may need to look to the more-complex, expensive packages.
- How well do your processes match typical ones? It's important to try to align your processes with grantmaking best practices before choosing a new grants management system—tailoring a system to idiosyncratic processes is, at best, expensive, and may be impossible. Take care before deciding you have unique needs. It's quite common to think your processes are unusual in an important way, but in many cases these processes can be tweaked to match best practices without sacrifice. However, if you have truly unique needs, you'll need to look for a system that can be substantially customized—often, by a vendor willing to update their software for an additional fee.

It's important to try to align your processes with grantmaking best practices before choosing a new grants management system.

- What types of software can your infrastructure support? Online hosted software is appealing to many organizations, as it doesn't require any hardware, software, or maintenance support. If you choose a software package that needs to be installed on your own computers, however, you'll need to consider how well you can support that package. What software will fit within your current technical environment? For instance, if your staff is using Macs, you may have trouble finding a package that can be easily installed. Will your existing hardware support the new software, or will you need to purchase new equipment? Will you need to bring on a staff member or consultant to maintain and upgrade the software? If you'll need additional resources, make sure you account for that in the price of the software.

Hopefully, the information in this report will help you narrow down the options to a handful of choices. You'll certainly want to take a careful look at those systems yourself before making a final decision. Think through your needs carefully—which of the features described here are critical for you? Which are only nice to have, or not useful for your organization? What other features, which aren't discussed here, might be useful?

It doesn't matter how good a particular grants management system is if it doesn't fit your organization's needs.

With that list of important features in hand, contact the vendors and ask for demos. Ask them to show you exactly the features you consider important. Consider giving them a script which walks through the tasks that you'd like to see demoed—for example, "I check the grantees that have progress reports due, and create a letter to mail to each of them." This can be very useful to help compare different systems to each other.

Use these demos to narrow down your choices to only a couple, and then ask those vendors for pricing information. For some systems, pricing is straightforward. For others, it's quite complicated, and may take some time for the vendor to estimate. Make sure you know what is included in the price. Will the vendor move any existing data into the system? Set up the system for you? Do more complex customizations?

A grants management system is only useful if it fits your organization's needs. It should make the jobs your already busy staff does each day easier and more efficient, allowing you to focus on your foundation's mission. There's much to consider when choosing such a system. Each of the available options has its own strengths and feature mixes, and cost isn't a guarantee of anything—especially since every grantmaker's needs differ. But if you do your homework and compare what's available with an honest evaluation of what you need, you'll find a system that will help you manage your processes more efficiently and communicate better with grantees.

REVIEWS OF THE GRANTS MANAGEMENT SYSTEMS

ALTUM EASYGRANTS

Easygrants combines sophisticated functionality with the ability to customize in depth not only all online applications, review forms, and grantee reports, but all workflow and tasks required for each program—including who should do which task, and when. Each user is presented with an easy-to-parse list of upcoming tasks assigned to them in a portal-like format; they can also search the system or perform bulk processes like send emails, print letters, or create reports. The system does not, however, easily support branching online forms. The system excels in its support for complex, online review processes, and is also good with mail-merged letters and automatic email reminders. The system can be hosted by Altum, but is often installed on grantmakers' own web servers. A mid-sized organization might expect to pay about $75,000 to $100,000 in first-year licensing costs, plus $50,000 to $200,000 or more for initial setup and configuration.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and see the specific percent allocation of a grant across each.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be entered into the system, but you must log in as a grantee to do so. Alternatively, you could scan in a paper application and attach it to the grant record, but the contents of the application would not be captured into fields that are searchable and reportable.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links. Can optionally save documents in Sharepoint if Sharepoint integration is chosen.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy they desire.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor. You can update or create these online

applications without additional charges from the vendor, but doing so requires familiarity with an XML data structure and the ability to add new fields to a MS SQL database. Alternatively, you may hire the vendor to update application forms for you.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but branching forms must be configured by the vendor at additional cost.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: An applicant record represents an individual, separate from the organization. When a new staff member creates an account, they can be connected to the organization's prior grant history.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications, unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but applicants can be prompted to save their work at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation.
- **Character and Word Counts**: The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In system Help**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text. The client provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Both internal and external reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily see what documents are associated with the request and stored in the system, but must download the files in order to view their contents.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which are customizable by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, but for a minimal extra cost the vendor could allow you to click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, but this could be added at additional cost.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.

- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system does not support electronic signatures.
- **Printed and Electronic Templates**: The system includes templates for email, but not print, formats.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual in the system, but not to a group of people at once. Users must export a contact list to email a group of people at once.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. Emails cannot be edited after merging.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees based on date, but not other triggers.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam, unless the client hosts the system themselves. In this case, emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization.
- **Record of Correspondence**: Stores a record of all system-generated emails for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with CRM systems, but has not been done with Outlook. Requires customization at additional cost.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" data collection based on grantee responses. The vendor can also customize data collection forms to meet requirements in terms of branching.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**:
- **Online Progress Report Submission**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting packages, including QuickBooks and Microsoft Dynamics, at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Currently supports grants in a single currency, of the client's selection. The vendor reports that currency conversion could be added to the system during the customization process.
- **Multi-Currency Reporting**: Lets you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests, organizations, and contacts to an accounting system.

- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system has the ability to update payment details in batch using the import tool, and to create payments in batch using the scheduling tool. In-kind and quid pro quo payments can be tracked separately from payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Lets you set up "what-if" scenarios, but requires a module at additional cost.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports, but requires customization at additional cost.
- **Attachment Searching**: Lets you search the contents of file attachments, but only through optional integration with Microsoft SharePoint.
- **Standard Reports**: The system does not by default contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI, but users can define these templates in the reporting tool.
- **Automating Reports**: There is no ability for reports to run automatically and send the results of a report to reviewers or users, without the use of third-party reporting tools.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no out-of-the-box ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis at additional cost.
- **Role-Based Interfaces**: Provides two different internal interfaces. One shows all system functionality. The other shows only the tasks specifically assigned to the user.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members, but requires add-on at additional cost.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides a SOAP API to allow a programmer to create custom automated data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system allows for a limited number of custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. Existing system fields can be renamed.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use, which are created by the vendor as part of their initial setup process.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, but possibly on a delayed schedule depending on degree of customization.
- **Support for Multiple Languages**: It's possible for grantmakers to provide instructions to applicants and grantees in different languages through online forms, but the system itself is in English.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support as part of the yearly maintenance fee. Phone support can be provided to grantees and reviewers as well at additional cost.
- **Online Support**: The vendor provides manuals and help documentation online.
- **Manuals and Documentation**: The vendor provides manuals and help documentation online, including online training materials, recorded training webinars, and videos.
- **Training**: The vendor provides training in person or via the internet, at additional cost. The vendor also holds regional support meetings.
- **User Support Forums**: There are user support forums or discussion groups available.

Installation and Maintenance

- **Installation and Maintenance Software**: Clients need user licenses for underlying systems (SQL, Windows Server, IIS Web server. Sharepoint). Hardware: Larger organizations will want to install redundant hardware (e.g., replicated database server with automated failover) and web servers with load balancing. For mid-size organizations best performance is provided by separating the functions onto separate servers: database server, web server for the application/users, document processing server (for assembly, merge, PDF conversion). Virtualization can reduce hardware expenses. A separate copy of the database on a reporting server is recommended to prevent ad hoc reporting from slowing the operational system.

Vendor Background

- **History**: Easygrants has been in use by clients since 1999. Easygrants was purchased by Altum in October 2006.
- **Client Base**: The vendor reports that they have about 21 clients. Breakdown by foundation type is approximately 57 percent nonprofit, 19 percent international, and 24 percent government.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**:: 1
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

ALTUM PROPOSALCENTRAL

ProposalCENTRAL is an interesting mid-market software package focused on health and biomedical research grantmakers. It is very strong in some areas—for example, it offers support for sophisticated online applications and some of the most powerful support for external review committees of any software package we looked at. Lack of budgeting support and weak mail-merge facility for printed letters, however, may make it less appealing to some organizations. A technical feel and suboptimal layout make the system harder to learn than many others. The system starts at about $10,000 per year for small foundations, and scales up through $100,000 per year or more for very large foundations with complex processes.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date. Categories and codes can only be assigned post-award.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and see the specific percent allocation of a grant across each. Applicants have the ability to define the categories or codes related to their proposal, and select the percent allocation to each.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Only lets you update grant information like project names or codes once the grant is approved, not during the application process. Prior to that, you must log in to the system as the grantee or request that the grantee makes the changes to their own grant application.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle. Search functionality is spread among multiple places depending on what you are searching for.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system, but you must log in as a grantee to do so.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Does not let you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy they desire.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

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- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: The pre-defined application sections include some branching questions—for example, to show a set of additional questions if a project involves human subjects—but in most cases branching questions must be configured at additional cost.
- **Support for Multiple Stages**: Supports two application stages: Letter of Intent stage and one additional stage.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
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- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Does not allow for automatic email notifications when reviews are completed.

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Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos. Customization of fonts, colors, and logos is applied by the vendor in the PDF output file the system produces.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You cannot view or customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**:
- **Printed and Electronic Templates**: The system includes templates for email, but not print, formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.

- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system does not let you keep track of individuals and their associations with a record, even if they leave, for historical and audit purposes.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Automatically stores a record of all system-generated emails for each grant. Letters or documents can be attached to the grant record by a staff user.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**:
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track expenditure data, outcomes, and performance metrics within the system, but not store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports. The vendor reports that most grantees send progress reports via attachment.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Does not let you create online progress report forms. All forms are created by the vendor. The vendor reports that most grantees send progress reports via attachment.
- **Creating Online Progress Report Forms**: Does not let you create online progress report forms. All forms are created by the vendor. The vendor reports that most grantees send progress reports via attachment.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests without exporting the information to Excel and manually mail-merging in Word.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including Quickbooks and other major packages, at additional cost.
- **Automated Payment Approval Process**: Does not let you set up payment controls to ensure that only certain staff can change payment information.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but the system only flags contigencies rather than enforcing them.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: The system has the ability to void or refund payments or put payments on hold.

Budgeting

- **Budget Tracking Configuration**: Not applicable. The system supports grant budgets, but not program budgets.
- **Budget Amount Reporting**: Not applicable. The system supports grant budgets, but not program budgets.
- **Hierarchical Budget Tracking**: Not applicable. The system supports grant budgets, but not program budgets.
- **Budget Basing**: Not applicable. The system supports grant budgets, but not program budgets.
- **Multiple Programs Per Grant**: Cannot split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Not applicable. The system supports grant budgets, but not program budgets.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items cannot be set up to automatically create grant requests.
- **Program-Related Investments**: The system supports interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Users can save the reports they create or modify in either a private folder, or as pulic reports, but otherwise there is no ability to quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users, but requires a separate module. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system contains report templates to easily align data with reporting standards used by the sector, including the Foundation Center eReporting Excel format.
- **Automating Reports**: There is no way to automatically send the results of a report to reviewers or users.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: Users can save a particular "view" or query, but cannot create a true dashboard.

Permissions and Workflow

- **Permissions Granularity**: You can affliate users with one of five pre-determined foundation staff roles, but there's no ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides five different internal interfaces—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members, though board members could be assigned a "view only" role.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles, but the set of tasks that can be assigned is limited.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system, but on a client by client basis upon request.

- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system includes many pre-built fields which can be configured or renamed by the user and can be reported or queried on, but the user-defined names do not carry over into the reporting tool.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use. These are custom data fields that can be defined and configured by the grantmaker for internal tracking.
- **Online Information Customization**: The vendor will customize the information requested in online applications and review forms.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Vendor can offer custom languages in limited areas of the application.

Ease of Use

- **Interface Layout**: The interface is not as polished looking as some systems, and fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support—not only to your organizational staff but to your grant applicants and external reviewers as well—without additional cost.
- **Online Support**: Vendor provides unlimited email support without additional cost.
- **Manuals and Documentation**: The vendor provides manuals and help documentation online, including online training materials, recorded training webinars, and videos.
- **Training**: The vendor provides initial training over the phone at no additional cost. The vendor does not offer any formal training.
- **User Support Forums**: There are user support forums or discussion groups available. There is a LinkedIn forum for proposalCENTRAL.

Installation and Maintenance

- **Installation and Maintenance**: Hosted system accessible via a web browser. All major web browsers are supported.
- **Vendor Background**: Vendor Background
- **History**: Altum incorporated in 1997. proposalCENTRAL began in 1999 with first production use in 2001.

- **Client Base**: The vendor reports that they have about 75 clients. Breakdown by foundation type is approximately 75 percent nonprofit, 5 percent international, and 20 percent government.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 2
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

BROMELKAMP AKOYA.NET

Akoya.net, Bromelkamp's online grants management system built on Microsoft's Dynamics CRM platform, provides solid mid-level functionality for a great price. Akoya.net leverages its Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, Pearl, Akoya.net relies on Bromelkamp's eGrant.net module for online data collection and grants review. Dynamics CRM makes for a solid grants management platform but its interface at times can obscure Akoya.net's functionality. You are currently limited to exporting data view-by-view, but the vendor plans an automated "backup" button in a future release. Bromelkamp is open to performing custom development at additional cost for clients who need it, and there are Dynamics CRM and Akoya.net APIs available for those who want to extend the system themselves. Organizations that accept online applications connect eGrant.net to Akoya.net. Those that need to build their own online forms require Bromelkamp's eGrant.net Builder module at additional cost. A small foundation would pay about $10,080 in the first year and about $6,180 ongoing per year for Akoya.net, including the eGrant.net module. A large foundation could expect to pay $36,422 in the first year, and then $14,922 ongoing per year, again including the eGrant.net module. This pricing includes eight hours of training.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but cannot track the specific dollar or percent allocation to each.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by starting a new request record from the system and choosing (or entering a new) applicant.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: The vendor recommends that clients use Microsoft Access's Find and Replace tool for batch updates.
- **Taxonomy**: There is no built-in compliance for an industry-standard taxonomy in the system. Users have the ability to customize system menus and field labels to match a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.

- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor, but requires eGrant.net module at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed, with the eGrant.net module.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees. Each organization shares a single account.
- **Transfer of Account and History**: There is no ability for grantees to transfer their account or grant history to a new staff contact. Each organization shares a single account.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Duplicate Accounts**: The system checks the applicant ID of new registrants to make sure that they don't already exist in the system. The system will prompt users with a list of possible duplicates to manually dedupe.
- **Viewing Status Online**: Applicants can view their status online, with the eGrant.net module.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application, with the eGrant.net module.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, with Builder module, at additional charge.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later, with the eGrant.net module.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but the system warns you if you do not save manually before leaving a page.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system from a unified account.
- **Grantee/Foundation Collaboration**: There's no means for an applicant and reviewer to work back and forth until a proposal is complete. The system allows admin users to send comments or request additional information from the applicant, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, with the eGrant.net module.
- **Character and Word Counts**: The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In system Help**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text. The client provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Both internal and external reviewers can easily print grant summaries or full grant information, with the eGrant.net module.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires the eGrant.net Reviewer module at additional cost.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, with the eGrant.net module.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, with the eGrant.net module.
- **Scoring Flexibility**: Supports different information or customizable scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications with the eGrant.net module.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, with the eGrant.net module.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score, with the eGrant.net module. You can also use radio button choices or lists of text values. Additional calculations are possible by exporting to Microsoft Excel.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, with the eGrant.net module.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c) nonprofit registry, and flags those not listed, but does not automatically fill in informaiton in associated fields.. This system checks against Guidestar. Organizations are checked automatically by Akoya.net on a regular basis, and Akoya.net keeps a copy of the verification PDF in the document manager. The system supports tax verification for all 501(c) types.
- **OFAC Status Checking**: Lets you compare organizations against standard OFAC and other terrorist watch lists within the grants management system itself, but indivduals cannot be checked. The system uses GuideStar Charity Check.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system typically uses individual user IDs for authorization. The system does not support third-party electronic signature services.
- **Printed and Electronic Templates**: The system includes templates for print and email formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Emails can be scheduled either by date or when a specific action occurs.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam. Optionally, email can be sent through the client's email servers.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system. Spell-check may be available depending on the email client you use.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can you communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact, or email reporting reminder to report contact)?
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.

- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook with a free plug-in from Microsoft.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff, as configured by the user or vendor.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, as configured by the user or vendor.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but requires the Builder module at additional cost.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information, but only supports a static currency rate conversion. Vendor could configure more robust multiple currencies at additional cost.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.

- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carries coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system create payments in batch using the scheduling tool. Payment details can be updated in batch through Find and Replace tool or update queries The system can track the monetary value of in-kind and quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount awarded in a particular year, and not the total amount paid in a year.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but requires customization at additional cost.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items are not linked to grant requests.
- **Program-Related Investments**: Support for interest repayments on PRIs is available through a separate product, at additional cost.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you save favorite reports, actions, and queries, referred to as on-demand workflows within the system.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments, but only through SharePoint integration at additional cost.
- **Standard Reports**: The system contains the Foundation Center eReporting Excel format, but not IATI Reporting Commitment or hGrant format. Users can add these themselves or ask the vendor to do so at additional cost.
- **Automating Reports**: Lets you set reports to automatically run and send to individuals.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.

- **Individual Dashboards**: Provides "dashboard" views which summarize the grants currently relevant to each individual user. Lets you create your own multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system, via ingegration with Outlook.
- **Task Assignment**: You can assign tasks, such as reviews, to other users, via integration with Outlook.
- **Board/Management View**: Provides a focused, roles-based view for management and board members which can be customized to meet specific organizational needs, but requires a module at additional cost.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into Excel format, but through an unautomated entity-by-entity process. The vendor plans an automated backup button in a future release.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system. Clients can interact programmatically with Akoya through the Dynamics API.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor reports that the system protects data through SSL security with multiple firewall protections and constant multiple-site backup

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Internal Tracking Fields**: There is no limit to the number of custom fields can be created. Lets users rename existing system fields, except for about a dozen core fields. Information stored in custom fields included in searches and reports.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms using the Builder module, at additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets for applicants and reviewers based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support as part of annual support and maintenance package, and also offers support by the hour.
- **Online Support**: Does not offer online or chat-based support available for users of the system.
- **Manuals and Documentation**: The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.
- **Training**: The vendor provides initial training in person at no additional cost, and additional training sessions can be scheduled at additional cost.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This online hosted system is accessible from Internet Explorer, Mozilla, Chrome or Safari browsers. IE is required for the Administrator to reconfigure the structure of the database.

Vendor Background

- **History**: The vendor has been in business since 1978; Akoya.net has been in use since 2010.
- **Client Base**: The vendor reports that Akoya.net has 12 clients. All are private or corporate foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 0.

BROMELKAMP FIRST PEARL

First Pearl is a traditional installed software package built in Microsoft Access, which is both a strength and a weakness. On one hand, Access includes a solid report builder, is strong in data tracking, and provides a flexible database platform—which Bromelkamp leverages to tailor First Pearl to each client's needs, including adding fields or features to support unique processes. Someone with Access development experience can extend First Pearl's functionality with minimal or no vendor assistance. On the other hand, Access has limitations in user interface design options, which manifests in First Pearl through screens that, while feature-rich, can feel crowded and hard to navigate. Access also lacks field-level security, but for clients concerned about this, Bromelkamp is able to effectively resolve the issue through creative use of custom secure database tables, and can leverage user permissions to protect or hide dynamically (by user or even by data condition). Also, an MSSQL version of First Pearl is available that provides field-level security. Organizations that accept online applications connect eGrant.net to First Pearl. Those that need to build their own online forms require Bromelkamp's eGrant.net Builder module, at additional cost. A small foundation could expect to pay around $17,430 for the first year (including eGrant.net) and $1,800 in annual recurring costs. A large foundation could expect to pay closer to $43,492 in the first year (including eGrant.net), and $7,242 in annual recurring costs.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system.
- **File Attachment Method**: The vendor recommends that clients use Microsoft Access's Find and Replace tool for batch updates, and Microsoft Access queries for more complex updates.
- **Batch Updates**: The vendor recommends that clients use Microsoft Access's Find and Replace tool for batch updates, and Microsoft Access queries for more complex updates.
- **Taxonomy**: The system supports the industry-standard taxonomy defined by the Foundation Center.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.

- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor, but requires eGrant.net module at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed, with the eGrant.net module.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees. Each organization shares a single account.
- **Transfer of Account and History**: There is no ability for grantees to transfer their account or grant history to a new staff contact. Each organization shares a single account.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Duplicate Accounts**: The system checks the applicant ID of new registrants to make sure that they don't already exist in the system. The system will prompt users with a list of possible duplicates to manually dedupe.
- **Viewing Status Online**: Applicants can view their status online, with the eGrant.net module.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application, with the eGrant.net module.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, with Builder module, at additional charge.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later, with the eGrant.net module.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but the system warns you if you do not save manually before leaving a page.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system from a unified account.
- **Grantee/Foundation Collaboration**: There's no means for an applicant and reviewer to work back and forth until a proposal is complete. The system allows admin users to send comments or request additional information from the applicant, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, with the eGrant.net module.
- **Character and Word Counts**: The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In system Help**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text. The client provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Both internal and external reviewers can easily print grant summaries or full grant information, with the eGrant.net module.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires the eGrant.net Reviewer module at additional cost.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, with the eGrant.net module.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, with the eGrant.net module.
- **Scoring Flexibility**: Supports different information or customizable scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications with the eGrant.net module.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, with the eGrant.net module.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score, with the eGrant.net module. You can also use radio button choices or lists of text values. Additional calculations are possible by exporting to Microsoft Excel.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, with the eGrant.net module.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. This system checks against GuideStar. Organizations are checked automatically by First Pearl on a regular basis, and First Pearl keeps a copy of the verification PDF in the document manager. The system supports tax verification for all 501(c) types.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists via an export to ChoicePoint's Bridger Insight.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system typically uses individual user IDs for authorization. The system does not support third-party electronic signature services.
- **Printed and Electronic Templates**: The system includes templates for print and email formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Emails are sent via the user's default email client. The vendor recommends using a broadcast email client, such as MailChimp or ConstantContact.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Does not let you set up event-triggered emails.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails can be sent through third-party email services. The third-party email service you choose may require an additional fee. Alternatively, emails can be sent through clients' email servers, but this can potentially expose them to risk of blacklisting.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system. Spell-check may be available depending on the email client you use.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can send email to any contact recorded in an application form, and attach a descriptive role to the contact.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.

- **Contact Synchronization**: System allows you to automatically export system contacts to a Microsoft Exchange public folder, but requires a module at additional cost.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Can “branch” data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online, but through customization at additional cost.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. Email templates built using Microsoft Word can include merge fields in order to include information specific to the grant program in question.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports through Bromelkamp eGrant.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Online progress report forms (for example, corresponding to different programs) can only be created by the vendor, often for an additional fee.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Doesn’t let you define a default payment schedule that applies to all grants, but you can define payment schedules by formula for different types of grants, then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions. Optionally integrates directly with bank or third-party payment processors to initiate the payments.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including Quickbooks, Sage 50 (formerly Peachtree), and Intacct.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: The core system only supports grants in a single currency, but the vendor can customize the system to support grants made in multiple currencies by storing currency and exchange rate information, at additional cost.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency, but requires multi-currency

customization at additional cost.

- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests, organizations, and contacts to an accounting system.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system can create payments in batch using the scheduling tool, but payment details can only be updated in batch through Microsoft Access's Find and Replace tool. The system can track the monetary value of in-kind and quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter only a single budget amount for your whole organization.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes without customization.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system has the ability to create grant requests based on budgeted line items in a proposal, using user-defined formulas.
- **Program-Related Investments**: Support for interest repayments on PRIs is available through a separate product, at additional cost.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.

- **Standard Reports**: The system contains report templates to easily align data with reporting standards used by the sector, such as the Foundation Center eReporting Excel format.
- **Automating Reports**: There is no easy way to set reports to run automatically and send the results of a report to reviewers or users in the system.
- **Visual Reports**: The system provides the ability to create pie charts as a separate report type. Additonal visualization is possible by exporting the report to Excel.
- **Individual Dashboards**: All users see the same view of information; no "dashboard" views are available.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis, but for the Access-based product, this requires vendor customization, possibly at additional cost. There is an MSSQL version of First Pearl that requires no such customization.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs. This is accomplished through First Pearl's "soft security," which can hide fields, tabs, or form sections on a per-user basis.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log, but requires configuration at no additional cost.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are available.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: Lets you assign tasks to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members, but requires a module at additional cost.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides a direct ODBC database connection to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices.
- **Grant Information Review from a Mobile Device [**: Does not let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity**: If installed on the client's server, the security of the data stored within the system is commensurate with the client's own Windows login security and backup. If installed on the hosted server, the security is through a secure SSL connection and appropriate Windows login security, RemoteApp, and backups.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: There is no limit to the number of custom fields can be created. Lets users rename existing system fields, except for about a dozen core fields. Information stored in custom fields included in searches and reports.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms using the Builder module, at additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.

- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code, so long as existing modules and macros are not changed. While the vendor allows source code access, they retain that the license to the code and the system is not "open source."
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: There's no ability to define custom language sets for applicants and reviewers based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is not as polished looking as some systems, and fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: The labels for navigation and action items are not always intuitive, meaning that many users will require training specific to the system in order to effectively understand them. However, a description appears on the status bar when the cursor is in the field.
- **Easily Taking Action**: Users must navigate through the main menu to take an action, regardless of the page they are on—making it slower to act on the record they are are viewing.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides support for a fee by the quarter hour, or unlimited support as part of annual support and maintenance package.
- **Online Support**: Does not offer online or chat-based support available for users of the system.
- **Manuals and Documentation**: The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.
- **Training**: The vendor provides initial training in person at the client site at no additional cost, and more training in person or over the web can be scheduled at additional cost.
- **User Support Forums**: There are no support forums available for this system. The vendor hosts an annual "Pearl Academy" and periodic user group meetings.

Installation and Maintenance

- **Installation and Maintenance**: Requires Microsoft Access (optionally with Microsoft SQL server) or can be hosted on the vendor's server for a monthly fee.

Vendor Background

- **History**: The vendor has been in business since 1978; First Pearl has been in use since 1997.
- **Client Base**: The vendor reports about 240 clients. Breakdown by foundation type is 25 percent private, 25 percent family, 25 percent corporate, and 25 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 64
- **Percent of Survey Respondents Who Would Recommend the System**: 84 percent

CLOSERWARE GRANTMAKER

Closerware's GrantMaker offers solid and affordable grant and application tracking features with reasonable support for online forms. Online application forms can be extensively formatted with a variety of field types, and the resulting applications and grants can be easily coded and searched. A variety of application-scoring options with the ability to summarize and report on numerical review scores add to GrantMaker's generally strong application review functionality. Lack of any substantial payment tracking functionality and budget support will disappoint some organizations, as will relatively weak email capabilities. GrantMaker licenses start at $600 per user annually, with volume discounts for five licenses and up. There is a one-time setup fee of $500.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by first scanning the document into a file and attaching it as a file to the application record.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: You cannot easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed, but there is no support for automatically scored eligibility quizzes.

- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: The system does not have the ability for an applicant to transfer their account and history to a new staff contact without contacting the grantmaker.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Duplicate Accounts**: The system does not automatically check new registrants to make sure they don't already exist in the system, but the user has the ability to manually consolidate applicant records by running a report.
- **Viewing Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but that message can't be customized.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text and create groups of questions, but the system uses collapsible sections in place of multiple page functionality.
- **Spell Checking**: Grantees cannot spell-check applications, unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress. Applications must be saved manually.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The preview packet does not include uploaded documents.
- **Security Scan**: The system itself does not scan files for viruses at upload.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system from a unified account without customization by the vendor, possibly at additional cost.
- **Grantee/Foundation Collaboration**: The system does not allow reviewers and applicants to work back and forth on a proposal.

Form Design and Flexibility

- **Look and Feel**: Applications are configured by the vendor at implementation, but can be edited by the client afterwards. The vendor can customize the form to match the look and feel of your website, at additional cost.
- **Character and Word Counts**: The system includes character and word counts for application questions. Admin users have the ability to set maximum character limits for each field.
- **In system Help**: The client provides technical support for applicants, and can contact the vendor to configure instructional text around application questions.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.

- **Printing Grant Summaries**: Both internal and external reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Does not let you define automatic steps and rules for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Does not allow for automatic notifications when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step, but this must be configured by the vendor at additional cost.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not provide support for electronic signatures to provide independent secure verification.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.

- **Event-Triggered Email**: Does not let you set up event-triggered emails.
- **Schedule-Triggered Email**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system.

Relationship Management

- **Tracking Individual History**: Does not meet this criteria.
- **Tracking Organizational History**: Organization information must be re-entered for each grant, and there's no easy way to see a history of all grants to a particular organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization, but this requires customization at an additional cost.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log without custom fields.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements that applies to all grantees, but those requirements cannot be customized for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online, except for what is availabe in the application instructions.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Cannot automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff, but to do so requires you to configure custom fields.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**:
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: The system does not support scheduled payments. You would have to use custom fields to approximate this functionality.
- **Check Requests**: Cannot generate paper check requests.

- **View Scheduled Payment Amount (Annual)**: Not applicable as the system includes no native support scheduled payments.
- **Schedule-Based Payment Viewing**: Not applicable as the system includes no native support scheduled payments.
- **Third-Party Payee Support**: Does not easily support payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors). Requires custom fields.
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check number, via an ad hoc report.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Does not allow you to set up payments contingent upon specified requirements.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: The system provides the ability to void or refund payments through custom fields only. It's not possible to create payments or update payment details in batch, and in-kind and quid pro quo payments can only be tracked through custom fields.

Budgeting

- **Budget Tracking Configuration**: Budgeting is not supported.
- **Budget Amount Reporting**: Budgeting is not supported.
- **Hierarchical Budget Tracking**: Budgeting is not supported.
- **Budget Basing**: Budgeting is not supported.
- **Multiple Programs Per Grant**: Budgeting is not supported.
- **Multiyear Budgeting**: Budgeting is not supported.
- **What-Ifs**: Budgeting is not supported.
- **Budgeting and Grant Requests**: Budgeting is not supported.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.

- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not, by default, contain report templates that align with sector-wide reporting standards. The vendor reports that they can build report templates upon client request.
- **Automating Reports**: Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, i.e., evaluator, report administrator, and grant administrator, but there's no ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: You cannot define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Does not provide a simpler interface for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log, but the log is not client accessible. The vendor would need to assist in information audits.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are available.
- **Users Task Lists**: Does not provide users a "task list" upon sign on, except for users with the "evaluator" role.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices.
- **Grant Information Review from a Mobile Device [**: Does not let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. The vendor will create custom fields for the client.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor excludes extensively customized systems from the upgrade path.
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides phone support on a subscription basis that is available 12 hours per day, Monday through Friday.
- **Online Support**: Vendor provides email support on a subscription basis that is available 12 hours per day, Monday through Friday.
- **Manuals and Documentation**: The vendor provides manuals and help documentation for the system online, including training videos and webinars.
- **Training**: Vendor offers training via webinars.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: The system can be used from any web browser.

Vendor Background

- **History**: The vendor has been in business since 2003. Grantmaker Closerware has been in general use since 2009.
- **Client Base**: The vendor reports that they have 30+ clients. Breakdown by foundation type is 65 percent private foundations, 28 percent family foundations, 7 percent corporate/government.
- **Sustainability**: The revenue earned from the grantmaking system currently does not cover the personnel and operational expenses required to support it. The vendor states Closerware's revenue from other products more than support the future growth of the GrantMaker product.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 0
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

COMMON GRANT APPLICATION

An online hosted option, Common Grant Application by Oceanpeak Inc. provides an affordable, easy-to-use system with some interesting features—particularly for applications. For example, applicants can easily attach video and other multimedia components to their applications. The applications themselves are limited in formatting and functionality, but online applications include a helpful, well-thought-out ability for applicants to reuse information. The vendor also reports being willing to customize the system at no cost to the client and roll out those changes to all users if the new functionality is deemed useful to the user community. On the other hand, much grantmaker functionality is notably absent, and relationship management is all but nonexistent, as is support for budgeting. Common Grant Application does not handle mail-merge fields for print or email correspondence. There is some ability to track payments, but no functionality to make payments contingent on a reporting requirement. The system now supports saving a list of favorite reports for easy access, and all visible system fields can be queried and included in both standard and ad-hoc reports—for instance, reports can be configured to include just text fields. Common Grant Application calculates its pricing partially by taking into account the number of applications received in a given year. For instance, a small foundation that receives only 10 applications annually could use Common Grant Application for around $1,270 per year, while a very large foundation with 100 applications a year could expect an annual fee of about $5,500.

Internal Tracking

- **Grant Cycle Linkages**: Grants and applications are split within the system.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle, but not by board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not by percentage or dollar allocations.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Does not let you define custom categorization codes, although the vendor suggested that custom reports could help retrieve some information.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by legal name, application ID, and program and grant cycle. EIN searching was added to the system after Idealware demoed it.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by starting a new application.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of some fields.
- **Taxonomy**: The system has a taxonomy within the system that is partially based on the National Taxonomy of Exempt Entities.
- **Ability to View Related Records and Data Across Records**: To see related records and data across records, you need to apply a filter to certain views.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individuals and organizations to apply for grants from the same grant program through conditional questions, although the application does not branch based on whether someone is applying as an individual or organization.
- **Creating Online Applications**: The system allows grantmakers to choose from a selection of standard questions, which can be dropdown, text box, check box, or file upload fields. Grantees can configure additional questions, which may only be answered by a text field.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports two application stages, including Letter Of Intent and a main application stage.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There's no ability for the grantee, applicant, or grantmaker to transfer an account and history to a new staff contact without having to share a staffer's username and password. The vendor must perform this transfer if the previous owner's username and password is not accessible.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system does not check the email address of each new registrant to make sure it doesn't already exist in the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Does not allow applications to be formatted using rich text or multiple pages. The grantmaker can select from a list of pre-built questions and can also make their own grouped supplemental questions, but no formatting is available for the application itself.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved as each section of the application is completed.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a basic virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Unified Accounts**: Applicants or grantees can manage all grant information for all of their funders in the system by using a single logon, and see the history of all applications they have submitted in the system.

- **Grantee/Foundation Collaboration**: The system does not have the ability to let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions. The application is private to the grantseeker until it is submitted.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms with your logo.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help customized by the vendor for each client, including YouTube videos. Rollover text on fields is standard, but there is a page help button that is configurable.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Does not support checklist functionality to define what information or documents you require from prospective grantees. The system does not allow incomplete applications to be submitted.
- **Reopening Submitted Applications**: Once an online application has been submitted, you cannot reopen it to request more information from the applicant.
- **Printing Grant Summaries**: Reviewers (in this system, evaluators) can easily print grant summaries or full grant information, and can filter by program or by date.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports three standard evaluation scales and two custom evaluation scales.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests, geographic location, or potential conflicts of interest.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—but not aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed with an in-system alert, but not via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system uses the IRS master business file. Auto-checks do not include a date and time stamp—they only show the last time the system checked. Fields are automatically populated with legal name, EIN, and tax status. Checks and updates cannot be performed in batch.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for grant application summaries and choose which fields to include, but you cannot customize the fonts, colors, or logo.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures that can legally demonstrate non-repudiation, but does not integrate with external providers like Verisign.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Formats can include QR codes to help expedite the review process.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular group of people at once, but not to individuals. Group emails are not sent via blind copy.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Does not let you set up event-triggered emails. The system can send email notifications on a set number of event conditions to grantmakes and applicants, who can individually choose whether or not to receive them.
- **Schedule-Triggered Email**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: You cannot keep a record of individuals who were once but are no longer associated with a grant within the system—they must be deleted from the organization.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization, although you can track by different grantmaker programs.
- **Multiple Contacts Per Organization**: Lets you provide primary and secondary fiscal agents and sponsor contacts for each grant application. You can also specify allowable signatories.
- **Customized Communication**: It's not possible to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications. These are posted to individual user message boards.
- **Call and Email Logging**: Does not let you keep a log of outside communications, such as phone calls and email.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Does not have the ability to “branch” data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, but you cannot merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: You cannot store progress report information submitted by grantees in multiple data fields.
- **Online Progress Report Submission**:
- **Creating Online Progress Report Forms**: Lets you specify templates for online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system does not have the ability to support user groups in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests or print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: You can view payments due but the system does not record prerequisite requirements associated with payments.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate, possibly at additional cost.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Supports grants made in multiple currencies, but does not include foreign exchange information.
- **Multi-Currency Reporting**: Supports reporting on grants and payments in multiple currencies, but does not include foreign exchange information.
- **Contingent/Conditional Payments**: Does not allow you to set up payments contingent upon specified requirements.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information. Users can be assigned to set roles, some of which have limited access to payment information, but these roles and associated permissions are not configurable.
- **Payment Notes**: There is no ability to include notes on payments, but you can include a reference number.

- **Payment Reporting**: Reports on payments do not carry coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: It's not possible to void payments, make refunds, or place payments on hold. There is no ability to update payment details (e.g., general ledger account, fund, etc.) in batch or create payments in batch. There is no ability to ability to track quid pro quo and in-kind payments.

Budgeting

- **Budget Tracking Configuration**: Does not track any budget information.
- **Budget Amount Reporting**: Does not track any budget information.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items do not connect to grant requests.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you save favorite reports on the Reports tab.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, and headers, but not logos.
- **Grant Summary Tracking**: You can define codes and see them in reports, but these codes cannot be rolled up hierarchically—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector.
- **Automating Reports**: Reports cannot be set to automatically run and send to individualsor groups.
- **Visual Reports**: There's no ability to create, view, and export data in a visual graphic representation, e.g., charts and graphs, although data is exportable to Excel for such transformation.
- **Individual Dashboards**: The system does not provide "dashboard" views that summarize the grants currently relevant to each individual user, and the system does not have the ability for users to create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.

- **Role-Based Interfaces**: Provides four different internal interfaces—owner, admin, evaluator, and reviewer—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log. Logs are viewable by the vendor but not by clients.
- **User Dashboards**:
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: Common Grant Application uses the Secure Sockets Layer (SSL) security mechanism to ensure the security and privacy of some data transmitted in the system.

Overall Customization

- **Dropdown Fields**: Some dropdown values are customizable but not all.
- **Custom Fields**: Does not let you add custom fields throughout the system. The vendor customizes the system for clients at the time of implementation.
- **Internal Tracking Fields**: Does not let you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you store custom information submitted by grantees, such as application narratives or progress report metrics. Online progress report forms can be customized with the foundation's logo.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at no additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: There is no ability to define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support to grantmakers and their grantseekers without additional cost, during business hours.
- **Online Support**: Vendor provides online help in the form of customized YouTube videos and in-system help.
- **Manuals and Documentation**: The vendor provides an online manual at the following URL: http://www.commongrantapplication.com/manual/pub/pub_manual.php.
- **Training**: The vendor provides initial training via phone and the internet at no additional cost, and additional training sessions can be scheduled. In-person training can be scheduled for a nominal fee.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2007; Common Grant Application has been in use since 2007.
- **Client Base**: The vendor reports that they have 22 clients. Breakdown by foundation type is approximately 40 percent private and family, 20 percent public, 10 percent community, 10 percent government, 10 percent public, and 10 percent corporate.
- **Sustainability**: Operating and personnel expenses are not currently covered by the revenue the system generates.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 12
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

CYBERGRANTS

CyberGrants offers a highly configurable online hosted solution with a particularly strong base of corporate foundation clients. The system has an easy-to-navigate interface and very solid online data gathering capabilities—for example, online support for eligibility quizzes, proposals, and progress reports—and administrative tracking features, such as the ability to update application information at any time, to attach internal use and coding fields to applications, and to create mail-merged letters. Internal tax status and OFAC checking is quite robust, and the system benefits from a user-friendly ad hoc reporting engine. The system lacks an internal communication log, though, and the fact that every reviewer must have at least a limited license to access the system means it may not be the best solution for foundations who use many external reviewers. The system also has substantial ability to develop custom functionality to complement its standard features. CyberGrants has two licensing levels, both of which include all modules, support, and maintenance. Small foundations with five users might pay in the range of $11,000 per year, and larger foundations could pay closer to $82,500 with 20 named users and 15 reviewers.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Cycles are not a system feature; this would be accommodated through configuration.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes through custom fields, and track by specific percent and dollar allocations.
- **Splitting Codes**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, PDFs, pictures, and videos.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle, and export search results.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by creating a new request associated with an existing account.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Batch updates to organizational records are possible but must be handled by the vendor.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but this could be configured.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications in the Sandbox envirnoment, including file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.

- **Number of Online Application Forms**: Lets you create unlimited online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications through conditional fields.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations through conditional fields.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees or applicants can transfer their account and history to a new staff contact without intervention of the grantmaker or vendor.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages in the Sandbox environment. More sophisticated applications are configured by the vendor.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Lost credentials can easily be reset by the applicant, but grantmakers must contact their administrator or the vendor to reset theirs.
- **Viewing Applications**: Applicants can easily view applications at any stage in the process, but a formatted "print view" is only available for completed applications.
- **Preview Packet**: The preview packet does not include uploaded documents.
- **Security Scan**: The system has a virus scan/security feature to prevent malicious files from being uploaded onto the application and downloaded onto system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet.
- **Unified Accounts**: Applicants or grantees can manage all grant information for all their funders within the system with a single username and password.
- **Grantee/Foundation Collaboration**: The system does not let applicants work on a proposal, submit as a draft, then allow reviewers to comment and make suggestions, and work back and forth until a proposal is complete. You can send the application back to the applicant after submission, however.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Forms are highly configurable to match an organization's brand.

- **Character and Word Counts**: The system includes character but not word counts for application questions, and does not display how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the vendor. Grantees and applicants can contact the vendor directly for technical assistance.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: External and internal reviewers can easily print grant summaries, but not full grant information including attachments, or sort or filter by program or date.
- **Reviewer's Portal**: You can configure a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but every reviewer must have a license to use the product.
- **Viewing Documents in the System**: Reviewers must manually open documents one by one associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. A workflow interface allows users to manage the workflow steps themselves.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, including geography or any other criteria. Each external reviewer must have a license to use the software.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: You cannot report on numeric review scores as summary statistics—for example, average score—but this can be configured.
- **Review Status Notification**: Proposal owner and grants management staff can be notified when reviews are completed, either via email, via dashboard, or by searching by approval stage.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed at the point of an organization's registration. Checks other lists, including those from Australia, NCES, Great Britain, and Canada. Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). You cannot perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist and money laundering watch lists within the grants management system itself through Bridger, a LexisNexis. Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). You cannot perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.

- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos, but you would need to code the HTML. You can export into Word, PDF, or .rtf format.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and which are time stamped, which are not externally verified.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent through blind copies, and there is a designated "reply-to" address.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and edit them after they've been merged.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups
- **Email Delivery Reporting**: Does not let you see email delivery statistics, but you can see if an email is undeliverable.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, but these need to be configured to a specific help.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: There's no dedicated in-system spell-check for emails.

Relationship Management

- **Tracking Individual History**: You would need to delete an individual no longer associated with a grant to have them not show up as an active contact for communication. The individual will still show up in the system's audit trail.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can be configured to track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" data collection based on type of grant through conditional fields.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: There is no easy way to see which requirements grantees have met, and which they have not; you must run a report to see this information.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees through ad hoc reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but the vendor generally configures more complex forms.
- **User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming, but you can only see whether the grantee has met the requirements linked with that conditional payment by doing a search to see what the unpaid balance is and then running a report.
- **Check Requests**: Can generate a paper check request for accounting, and print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: You must run a report to see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors). There's a standard field for "in care of" recipients.
- **Electronic Payments**: Supports ACH payments and wire transfers through custom configuration.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages by building a custom feed at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement through customization.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.

- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts through ad hoc reporting.
- **Other Payment Issues**: Lets you void, make refunds, and place payments on hold. Lets you track quid pro quo and in-kind payments. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount only for each request.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas. In the demo environment we saw, each line is associated with specific requests and tied to organizations.
- **Budget Basing**: Lets you easily use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than budget line.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, and compare budgets across
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items are linked to grant requests.
- **Program-Related Investments**: The system does basic support for PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is designed to be easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. The system has strong support for ad hoc reporting, however.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set. "One-Click Reports" saves a query. You can also tag reports.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants—through ad hoc reporting.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on ad hoc reports.
- **Attachment Searching**: Does not currently let you search within attached documents, although the vendor reports this feature is now available in beta.
- **Standard Reports**: The system contains the Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: It's not possible to create, view, and export data in a visual graphic representation, e.g., charts and graphs, other than in the Dashboard section.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users cannot create their own dashboards, but administrators have those permissions.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Could provide a focused, roles-based view for management and board members via dashboards and role definitions.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system. CyberGrants does this themselves.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. The vendor is in the process of optimizing the user interface to be mobile and tablet responsive.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. The vendor is in the process of optimizing the user interface to be mobile and tablet responsive.
- **Data Integrity**: The vendor uses SSL and 128 bit encryption to protect data in the system.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you add unlimited custom fields of 18 different types throughout the system that for the most part have the same permissions as system-generated fields. You can see when a field was published but not all the details about it in the audit log.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost. Implementation includes some customization.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, and makes sure that enhancements don't affect customizations through the maintenance fees.
- **Support for Multiple Languages**: The vendor reports that custom language sets are forthcoming in the fall 2013 release.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides phone support at additional cost.
- **Online Support**: Vendor provides FAQs configurable by the grantmaker for each of their giving programs and provides email support to all clients' grantseekers at no additional cost.
- **Manuals and Documentation**: Manuals and release notes are available online. Clients have access to webinars of new features after a release.
- **Training**: The vendor provides initial training in person or via the internet at additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: User support forums or discussion groups are available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1999. The software was developed as a custom tool and has been in use since 2001.
- **Client Base**: The vendor reports that they have about 300 clients. Breakdown by foundation type is 13.3 percent private, 8.7 percent family, 76.5 percent corporate, and 1.4 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 11
- **Percent of Survey Respondents Who Would Recommend the System**: 80 percent [Note that this represented 8 out of the 10 people who answered this question.]

DULLES TECHNOLOGY PARTNERS WEBGRANTS

WebGrants is a well-designed, mid-market online package with support for the full grant lifecycle. Users can define sophisticated online application forms, review forms, and grantee report forms to collect extensive information. However, there's no support for forms that can branch based on form entries. The system also allows you to build your own custom application review forms for internal or external use. Ad hoc reporting capabilities are strong, and the system provides useful internal tracking functionality, but administrators can only search on a limited number of fields. Some standard reports are available, or data can be analyzed with the included Jasper Reports engine. Letter templates can be set up with merged data fields. The system is typically licensed as a one-time fee for unlimited use, and then installed on the user's internet servers. The license fee is typically between $15,000 and $45,000, depending on what modules are purchased.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not specific percent or dollar allocations.
- **Splitting Codes**: It's not possible to split grants across different codes by default, although this could be customized.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are by default searchable by organization's legal name, application ID, and program and grant cycle, but not by EIN. Through customization by the vendor, it's possible to search by any field.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system through the "people" database. Application can be scanned to PDF and attached to the application record, or it can by typed in manually.
- **File Attachment Method**: The system uploads attached documents to the vendor's server and stores a link to that uploaded file in the database.
- **Batch Updates**: Does not let you perform batch updates of defined coding and other fields, except to update grant status.
- **Taxonomy**: There's currently no support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: Lets both individuals and organizations apply for grants from the same grant program, but there's no branching logic applied when one applies as an individual versus an organization.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.

- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations. The system does support making fields required or optional based on the answers to prior questions.
- **Support for Multiple Stages**: Supports two application stages, including a scorable eligibility quiz and a final application stage.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There's no ability for a grantee or applicant to transfer account and history to new staff contact, but this can be done by a grantmaking staffer.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Duplicate Accounts**: There is a process for grantmakers to review applications to look for and merge duplicates.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications, unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The preview packet includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers virus scan to prevent malicious files from being downloaded onto system.
- **Mobile Device Application Access**: The system does not explicitly support application process via mobile or tablet.
- **Unified Accounts**: Applicants or grantees are able to manage all grant information for all funders in the system.
- **Grantee/Foundation Collaboration**: The system does not by default have the ability to allow grantees and reviewers to both comment and collaborate on a proposal before submission, although this could theoretically be supported by multiple application rounds.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, navigation, and advanced online form design, like HTML, hyperlinks, and columns.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In system Help**: Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms. The vendor asks the foundation to be the "first line of defense" for applicant inquiries, but can take on technical inquiries as needed.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Does not support checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: It's not possible for external reviewers to print grant summaries or full grant information simultaneously.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system, but they must open each attachment one by one.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Each review form is a custom form.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. The system also facilitates "static" panels of reviewers meeting a certain criteria of expertise or geography.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. Score aggregation is available only by running a report.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed. The grantmaker can choose whether to have this happen via email or within the system.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, but this has been added through customization at additional cost in implementations.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, but this has been added through customization at additional cost in implementations.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures with a user ID and a time stamp.
- **Printed and Electronic Templates**: There are no default templates for electronic or tablet view.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are sent as blind copies.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. It's not possible to edit one-off emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the send state of email, i.e., pending, sent, or failed, but not rates of open, click-through, and unsubscription.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as defining in-system alerts to trigger emails.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's not possible to automatically communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact). However, the system synchronizes contacts from an organization and gives access to form completion online so the appropriate contact is completing the form.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: There's currently no ability to "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and lets you merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.

- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but doesn't include any suggested formats.
- **User Groups**: Does not support user groups to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but not print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments through Claims Annotations.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, make refunds, and place payments on hold, but these are simply statuses that don't synch with accounting. Lets you update payment details (e.g., general ledger account, fund, etc.) in batch and create payments in batch. There is no ability to track in-kind and quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.

- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can automatically create grant requests.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports, queries, or actions without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers. The system has the ability to use calculated fields in ad hoc reports, i.e., use searches or filters on individual columns, and the ability to create ad hoc top N (ranking) and summary (roll up) reports.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not include report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: The system doesn't have the ability for reports to automatically run and be sent to individuals or groups.
- **Visual Reports**: The system does not let you create, view, and export data in a visual graphic representation, e.g., charts and graphs.
- **Individual Dashboards**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis, but only for a few fields.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs. Read-only or dashboard views can now be set up for certain users.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users within a certain grant.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: No data available.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: There's no limit to custom fields, and they are indistinguishable from system-standard fields. Lets you track creation and change of custom fields. Lets you customize field names.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and/or code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: There's no ability define custom language sets based on user, group, or giving program. The system supports all UNICODE characters.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support between 7 a.m. and 8 p.m. ET, Monday through Friday.
- **Online Support**: Vendor provides unlimited email support without additional cost. The online help consists of custom system documentation that each customer receives.
- **Manuals and Documentation**: The vendor provides customer specific and updated documentation at the end of the project.
- **Training**: The vendor provides in-person or remote training at the client's request.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1999; WebGrants has been in general use by clients since 2001.
- **Client Base**: The vendor reports that they have more than 50 clients, with 50 percent government, 20 percent charity, 10 percent university, 10 percent art, and 10 percent other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 6
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

DONATIONXCHANGE

This online hosted system, specializing in corporate and private foundations, provides well-rounded functionality. DonationXchange has solid application review features, and online application forms are flexible, with the option to embed the forms directly in a webpage, but support for online applicants is not as strong as in other systems reviewed in this report. Budgeting in the system is mostly solid, and an integration with QuickBooks provides strong functionality for tracking payments. While the system provides decent email capabilities, support for letters and other print communication is rather basic. A smaller foundation with five users dealing with under 100 grants a year could get up and running in the system for about $10,000; larger foundations dealing with 100 grants or more per year and 10 concurrent users could expect to pay $40,000 or more in the first year.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, through custom fields only.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, grant type, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system through the "quick request add" interface.
- **File Attachment Method**: At this time, the system saves only the link (i.e., file system path) for attached documents.
- **Batch Updates**: Does not easily let you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy they desire.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.

- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees for individual applications, but does support multiple logins within grantseeking organizations.
- **Transfer of Account and History**: The system does not have the ability for applicants to transfer their account and history to a new staff contact without contacting the grantmaker.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can format applications using groups of questions and rich text, but not multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: Applicants can use the same account for all funders in the system.
- **Grantee/Foundation Collaboration**: The system does not allow reviewers and applicants to work back and forth on a proposal.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, or embed them on your website.
- **Character and Word Counts**: The vendor can set character counts, but not word counts, for application questions, and can set a maximum limit for each.
- **In system Help**: Clients have the ability to customize the text around an application form to provide additional instructional text. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Does not support checklist functionality to define what information or documents you require from prospective grantees.

- **Reopening Submitted Applications**: Once an online application has been submitted, you cannot reopen it to request more information from the applicant.
- **Printing Grant Summaries**: External reviewers are able to independently print the summary and full details of the grant application.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be set up and customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. Tax verification is not only for 501(c)(3) but for all 501(c) types. Tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: You cannot view or customize individual letters before printing them, unless performing the mail-merge in Microsoft Word.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not support electronic signatures with an external approval process.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.

- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. Merged emails can be reviewed or edited prior to sending.
- **Email Attachments**: Does not let you attach files to emails. Lets you include a link to files uploaded to the system in emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the click-through rate, but not the open rate for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees at a specific date and time.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you note interactions with a grantee through multiple internal notes, but currently does not support a more detailed communications log.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track that a progress report has been received, but not whether staff has approved it.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on individual grantees, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Includes a robust, integrated accounting package, or integrates tightly with an external accounting package.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information at time of submission.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement through notes.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Scheduled and pending payments can be voided, refunded, or put on hold, but not after the payment has been released. Batch updates to payment details are only possible by manually importing the data as a spreadsheet.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending). You cannot easily track additional categories as well, though—for example, to track budgets for both programs and geographic areas.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **What-Ifs**: Does not let you set up "what-if" scenarios.

- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to payments.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, searches, and notes without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not, by default, contain report templates that align with sector-wide reporting standards, such as the Foundation Center eReporting Excel format, Reporting Commitment hGrant format, or IATI. The vendor reports that they can build report templates for the client at implementation.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: Provides “dashboard” views to summarize the information relevant to the user within the system, depending on role.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: It’s not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Lets you see different dashboards based on your role within the system.
- **Users Task Lists**: Does not provide users a “task list” upon sign on, at the time of this review.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices at this time. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. The vendor reports that a mobile app should be available in early 2014.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device at this time. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. The vendor reports that a mobile app should be available in early 2014.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its server.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you create unlimited custom fields within the system which have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is not as polished looking as some systems, but the interface is clean and fields are neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides phone support at additional cost.
- **Online Support**: Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation**: The vendor provides manuals and help documentation online.
- **Training**: The vendor provides initial training in person or via the internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: Currently, there are no user support forums or discussion groups available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business for 14 years; the system has been in use by clients for four years.
- **Client Base**: The vendor reports that they have about 230 clients. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 0
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

FLUIDWARE FLUIDREVIEW

FluidReview (by the makers of FluidSurvey) is a configurable and polished online system with an emphasis on forms. The form builder is very flexible and easy to use, allowing users to drag and drop fields to add, remove, or rearrange application questions. Workflow is strong and rather straightforward to set up, as is application review. However, support for payments and budgeting is minimal, and while email is fairly strong, users must create mail merges for letters or other print communication outside of the system. A smaller foundation that awards about 10 grants per year may be able to get started with FluidReview for as little as $4,000, while a client with more advanced needs and larger grant programs may see annual costs up to $30,000.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes. It's possible to build reports to show the specific percent or dollar allocations across these codes.
- **Splitting Codes**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The system supports an industry-standard taxonomy. Users have the ability to customize system menus and field labels to match a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.

- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The applicant has the ability to change their account information, user ID, and password, in order to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view applications at any stage in the process, but applications can only be printed by applicants after submission.
- **Preview Packet**: The system does not allow applicants to create a preview packet of their grant which includes uploaded documents. Applications can only be printed by applicants after submission.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet, using responsive design.
- **Unified Accounts**: Applicants can use the same account for all funders in the system; they will have to log in from each funder's portal separately, however.
- **Grantee/Foundation Collaboration**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation.
- **Character and Word Counts**: The system includes word counts for application questions. Admin users have the ability to set maximum and minimum word limits for each field.
- **In system Help**: The system provides a standard FAQ list for applicants, as well as a help desk and support ticketing system. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.

- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Does not support printed summaries of grant applications.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Does not let you print letters in a single step, but you can print each one individually. It is possible to print summaries for a series of grants or grant applications in a single step, but only by generating a custom report.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to the board docket if sent as an email only.
- **Electronic Signatures**: A signature line on forms allows applicants to "sign" with their mouse cursor, but the system does not support electronic signatures with an external approval process.
- **Printed and Electronic Templates**: The system includes templates for email, but not print, formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. Individual emails can be edited after the batch is merged, prior to sending.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.

- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
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- **Tracking Business Units**: Can track individual business units under a larger organization only as "members" on an application or proposal.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system without customization.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
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- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
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- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
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- **User Groups**: Lets you configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.

- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests without the use of custom fields.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount and date paid.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement. This functionality is handled through the workflow functionality, however.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests, organizations, and contacts to an accounting system.
- **Other Payment Issues**: The system provides the ability to void or refund payments and make negative transactions. It's not possible to create payments or update payment details in batch, and in-kind and quid pro quo payments can only be tracked through custom fields.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending). You cannot easily track additional categories as well, though—for example, to track budgets for both programs and geographic areas.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.

- **Program-Related Investments**: The system does not currently support interest repayment on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
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- **Report Drill-Down**: Lets you drill down for more information on some or all reports, if you include the correct filters when designing the report.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not, by default, contain report templates that align with sector-wide reporting standards.
- **Automating Reports**: Reports can be set to automatically run and send the results to reviewers or users.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view and a reviewer view—to provide a simpler experience for users with less-complex needs.
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- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
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- **Board/Management View**: Provides a focused, roles-based view for management and board members which can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data

feeds to or from an external system.

- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device** [: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's possible for clients to define custom language sets for system navigation and menus, or create application forms in multiple languages.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support to the primary grants management contact without additional cost.
- **Online Support**: Vendor provides unlimited online or chat support to the primary grants management contact without additional cost.
- **Manuals and Documentation**: The vendor provides help documentation online, including video tutorials and FAQs, as well as in-application help text.
- **Training**: The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: There are user support forums or discussion groups available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business for six years; the system has been in use by clients for five years.
- **Client Base**: The vendor reports that they have about 350 clients. The vendor does not keep records of breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.
- **Customer Experience Survey**:
- **Number of Survey Respondents Who Reported Using the System**: 6
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

JK GROUP EASYMATCH

JK Group's EasyMatch provides outsourced foundation-operation management services, specializing in corporation foundations. Each system is custom built, with online application forms, online progress reports, workflow, and viewing screens all tailored to the client's needs. The core system supports matching gifts and volunteer programs, and has solid budgeting functionality. Relationship management features are strong, as is support for producing mail-merged letters and board dockets. A new self-service reporting tool adds more functionality and flexibility for ad hoc reporting and saving favorite reports. The vendor still performs most customization for clients, including for online application and progress report forms, although a forthcoming release is designed to provide users with more ability to do some of this work themselves. JK Group's grants management solution typically costs between $8,000 and $17,500 to set up, and from $10,000 to $20,000 annually, including support and maintenance.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, as well as by percentage. You can track by dollar amount with configuration.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting. The vendor will create custom categorization codes for online hosted customers at additional cost.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle, and classification.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Does not easily let you perform batch updates of defined coding and other fields, though the vendor can perform this task for you.
- **Taxonomy**: There's currently no support for an an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system can be configured to allow both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor, though the vendor typically configures these forms for clients. Training is available to help you customize the system yourself, and the vendor reports that the 2014 release will add some more functionality around self-configuration.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program, though the vendor typically configures these forms for clients. Training is available to help you customize the system yourself, and the vendor reports that the 2014 release will add some more functionality around self-configuration.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Authorized representatives from grantseeking organizations can update staff account information to transfer a departing staffer's history to a new user, as well as create a new user. The foundation can also perform this transfer from the back end.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system, and prompts the registrant with the existing credentials at the time of registration.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but that message can only be customized by the vendor. The message template itself is customizable.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, though the vendor typically does this for clients.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: The system does not explicitly support application process via mobile or tablet, although the administrative interface is fully functional on a tablet device.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system.
- **Grantee/Foundation Collaboration**: The system does not have the ability to let a grantee work on a proposal, submit it, allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. More advanced online client configuration tools will be forthcoming in 2014.

- **Character and Word Counts**: The system includes character but not word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In system Help**: The system includes guidelines and FAQs that are editable by the foundation staff. Grantseekers can contact JK Group directly for any assistance regarding the grantmaker's program.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Does not support checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can print grant summaries or full grant information by clicking a "print" icon within the application itself. Uploaded files will show as links within the system.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: The vendor can define automatic steps and rules, or "workflow," for the grants review process. The vendor can also make changes to workflow, often at no additional cost, depending on the complexity of the change. The vendor reports that a new release in 2014 will allow for the ability for users to manage and alter their own workflows.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. This is currently customizable only by the vendor, although a new release in 2014 will allow for the ability for users to customize their own scoring schemes.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest, or track reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. You can assign different weights to the scores and then aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, but only on the home page, not via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Lets you click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits via the IRS database. The vendor also provides (optional) comprehensive organization vetting and compliance services. Tax verification includes all 501(c) types. Fields are auto-populated with related information. All such checks performed by client include date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s).
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. JK Group's systems are tied to Thomson Reuters Accelus Worldcheck. Fields are auto-populated with related information. All such checks performed by client include date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s).

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: The vendor can create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are sent as blind copies.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. You can edit emails from a batch sent out based on a template, but only within an hour and a half after sending.
- **Email Attachments**: Lets you attach files to emails sent to individuals, but not groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees based on calendar dates.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.

- **Email Capture**: Does not let you automatically capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can set up default requirements that apply to all grants, but only the vendor can alter requirements for each grantee individually.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and lets you merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but doesn't include suggested formats.
- **User Groups**: Does not support user groups to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that automatically applies to all grants, but cannot be updated for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. Lets you print checks directly from the system, but only one at a time. The vendor offers check printing as a service.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but can export payment information to a csv file that can be imported into an accounting package.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.

- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Does not let you include a note on a payment.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void or place a hold on payments, but only if your organization (and not the vendor) is handling payment processing. The system has robust support for quid pro quo and in-kind payments. The vendor can create and update payments in batch for you.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: It's possible for budgeted line items to create grant requests through a one-click process.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: A new self-service reporting tool is designed to make reporting accessible to casual users.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants. A new self-service reporting tool is designed to facilitate ease of access to the data warehouse.
- **Report Modification**: Lets you modify standard reports.
- **Favorite Reports, Queries, and Actions**: Lets a user view reports they have modified without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not include report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user, and lets users create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Does not provide a dedicated simplified interface for users with less-complex needs, although you can hide areas of the system based on user roles or permissions.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members, although you can tailor this view through system Permissions and Workflow.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles, although the system can provide automatic notifications and grant assignments.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets and mobile devices, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets and mobile devices, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: JK Group undertakes a SSAE 16 Audit each year, and reports that their systems must adhere to some of the most stringent IT, security, and operational protocols in the world. More information is available upon request from the vendor.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The vendor can create unlimited custom fields for the grantmaker's use.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at no additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: There is the ability to define custom language sets based on user, group, or giving program , but only on the front end of the system.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support as part of annual fee, and provides access to an in-house Contact Center, which consists of nearly 60 representatives to provide assistance to participating organizations.
- **Online Support**: Vendor provides help links throughout the system. The Client Success Manager assigned to each company acts as the single point of contact for all back- and front-end users.
- **Manuals and Documentation**: Documentation is provided online via a link from the administrative tool. A User's Manual is provided for program administrators.
- **Training**: The vendor offers a full day of on-site training at no additional fee (client is responsible for travel-related costs) and provides all reasonable and required online training for program administrators.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1989; this package has been in use by clients since 2003.
- **Client Base**: The vendor reports that they have 60 clients using the grants management solution. All clients are corporate clients.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 1
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

FLUXX

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as "dashboards" containing frequently viewed information. These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system, and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has also added some new capabilities, such as batch update functionality, in-system support for Google Drive attachments, integration with several accounting packages, and robust OFAC checking. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Those fees range from implementation fees of between $15,000 and $30,000 and ongoing annual fees of between $7,000 and $12,000 for small foundations up to implentation fees over $100,000 and annual fees of between $25,000 and $85,000 for large foundations.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs. The system is also tightly integrated with Google Drive, and supports editing Google Doc attachments within the system. All files can be previewed directly within the system.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle. The system has the capability to perform a universal search.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system without the need to log in as the applicant.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database. Optionally, files could be stored on a SharePoint server or on the client's file server with a link to it stored in the database. You can also attach Google Docs within the system.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is currently support for an hGrant feed within the system, and the vendor is working with partners including GuideStar and the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including eligibility quizzes, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There's no ability for the grantee or applicant to transfer their account and history to a new staff contact, although a foundation staffer could do so in bulk from the back end.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but there is a manual save option.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. Clients can opt for manual approval of registration requests or to allow applicants to register themselves.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applications can be viewed by applicants at any stage, and can toggle into a print view at any stage in the workflow.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Unified Accounts**: There's no current means for applicants or grantees to manage all grant information for all of their funders in the system, but the architecture of the software could support this, and the vendor reports that this is on the product roadmap.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete, on a field-by-field basis.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. You can also fully match the style sheet of your foundation's website.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the foundation staff. There's also a help ticketing feature for applicants to flag issues for grantmakers.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant. Any approvals processes required by the workflow would need to be repeated for reopened applications, but only if the request was declined and reopened, or manually moved back multiple steps in the workflow.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information as a PDF. Audio and video attachments can be viewed within the system.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Lets reviewers easily view selected documents associated with the request and stored in the system. Audio and video files are playable within the browser. Google Drive files can be edited within the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process and configure a workflow without the assistance of the vendor. Workflows can branch based on various factors, such as request amount.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes are customizable, and can be number-based or narrative.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. Lets you track reviewers and applications by geography or other criteria defined by grantmaker for making assignments. You can also create and save review panels to assign to requests.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades. You can also choose to keep all comments and grades anonymous, but still make them public to other reviewers.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either by alert within the system or via email based on configuration.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. The system uses GuideStar Charity Check. Provides updates based on the revocation list. The tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC , SDN, and other terrorist watch lists within the grants management system itself. The OFAC check includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for grant application summaries, choose which fields to include, and customize the logo.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process. The system also has an integration with Verisign.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Tablets can be supported through PDFs.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. MailChimp integration is available for bulk emails. MailChimp service requires an additional fee. Group emails are not sent via blind copy.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. In order to edit an email after it's been merged, you would need to send it to Outlook first.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports, but only for emails sent through MailChimp integration. MailChimp service requires an additional fee.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as well as schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: Lets you spell-check emails with a built-in, dedicated spell-checker.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of individuals no longer associated with a grant by "archiving" them for historical and audit purposes, and they will not show up as active contacts for communication.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.

- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Microsoft Exchange.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you “branch” evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines, and pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **User Groups**: You could configure the system to track user groups to collect uniform evaluation data through segmenting those groups and then tracking them ad hoc reporting or a filtered card.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment. This is done by allowing you to filter on whether a payment is actually due (due with no unmet requirements) or tentatively due (due but with unmet requirements).
- **Check Requests**: Can generate a paper check request for accounting, and send requests to print checks to the accounting software packages with which the software integrates.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.

- **Accounting Integration**: Integrates tightly with the following accounting software packages: QuickBooks, Microsoft Great Plans, Intacct, and NetSuite.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments and place payments on hold by creating statuses with workflows associated with them. There's no default ability to track quid pro quo and in-kind payments, although this could be tracked in custom fields. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Lets you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to payments.
- **Program-Related Investments**: The vendor has customized the system to track interest repayment on PRIs for several clients.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants. Also, data from filtered cards can be exported to Excel with one click.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name, save, and share ad hoc reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting. Users can define what fields are pulled into reports, and columns can be grouped and summed. Data within a filtered card can be exported to Excel, and Fluxx users can define which fields are populated on that spreadsheet (and in which order).

- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down on some reports, depending on the type.
- **Attachment Searching**: Lets you search within attached documents.
- **Standard Reports**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI. The system also has the ability to pull in data feeds from external sources, such as the World Bank or U.S. Census.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard, and users can monitor indicators personalized to them.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides five different internal interfaces—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs. Unlimited roles and views can be configured.
- **Audit Logging**: Records all data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: There is a dedicated iOS app to support application review.
- **Grant Information Review from a Mobile Device [**: There is a dedicated iOS app to support grant information review.
- **Data Integrity**: The vendor protects the security and integrity of data stored within the system through a variety of methods, including a firewall, TLS/SSL encryption, and two-factor authentication. The hosting of the system is provided within the Amazon Web Services cloud, and uses that provider's robust security protocols and backup procedures.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you create unlimited custom fields within the system which have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.

- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: On the core interface pages, the user can easily find the actions he or she is most likely to take. The User Interface is configured to meet the specific needs of the client.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take, though the navigation scheme is unique. Users who are familiar with other grants management systems may require substantial training.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Fluxx provides phone support to end users, included in support and maintenance fees.
- **Online Support**: Fluxx's support team is available via email and there is a support portal using Zendesk.
- **Manuals and Documentation**: Detailed help documentation is available through the system.
- **Training**: Fluxx provides initial training, which is covered by the implementation fee.
- **User Support Forums**: There is a "Project Fluxx" support forum on Google Groups, but it tends toward developers rather than users.

Installation and Maintenance

- **Installation and Maintenance**: The system can be hosted by FluxxLabs—Fluxx (io), or can be installed on clients' servers. For clients who wish to host their own Fluxx installation, Fluxx runs on Mac, Windows, or Linux servers (Linux is recommended) and is built in Ruby on Rails on a MySQL database.

Vendor Background

- **History**: The Fluxx project has been in existence since 2005. FluxxLabs (the organization that provides Fluxx support and training) has been in operation since 2010. Fluxx has been in use by clients since 2010.
- **Client Base**: The vendor reports that they have 53 clients. Breakdown by foundation type is 80 percent private, 5 percent corporate, and 15 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 5
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

FOUNDANT GRANT LIFECYLE MANAGER

Foundant Grant Lifecycle Manager is a polished, friendly, and quickly growing low-cost grant management option with a strong focus on online data gathering. Easy-to-update online forms allow you to collect online grant applications, feedback from external reviews, and online progress reports from grantees. But the system still has only basic support for payments and budgeting and doesn't support branching for applications or data collection. It does not allow users to interact with data via an Application Programming Interface. It does, however, allow you to export most visible data from the system. Foundant is very reasonably priced, at $6,500 for a two-year license that includes support, and $1,500 for a one-time setup cost. The vendor also offers notably strong customer support and training options for a system of this price tier, and has an active and growing user group community.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.It's not possible to assign specific percent or dollar allocations.
- **Splitting Codes**: It's not possible to split grants across specific codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs. Images can be converted to PDFs, but audio and video attachments must be downloaded seperately.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, workflow stage, date, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Does not easily let you perform batch updates of defined coding and other fields.
- **Taxonomy**: The vendor is working with partners including GuideStar and the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system does not allow both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: There's no eligibility quiz available in the system.

- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports up to three application stages, including a qualification stage, Letter Of Intent stage, and proposal stage.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: A new organization view supports multiple logins for grantees.
- **Transfer of Account and History**: It's not possible for a grantseeker to transfer their account and history to another person within that organization. The Foundation Administrator can make the transfer on the back end.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you send an automatic confirmation to a grantee upon submission of an application.
- **Application Formatting**: Grantmakers can format applications using groups of questions and rich text, but not multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system does not allow files with any executable-related file extension (.exe, .bat, etc.) to be uploaded for security purposes. The system also offers security scan at the point of download.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a grantmaking staffer to comment or make suggestions, and work back and forth until a proposal is complete on a field-by-field basis.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, but requires in-depth knowledge of HTML and style sheets. Look and feel customization is typically performed by the vendor during intial setup.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help configured by the vendor to be personalized to the foundation's particular needs.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees, but requires you to set up custom fields to create the checklist.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries—these summaries, stored in PDF format, include every field in the application and all document or image file attachments. The system can be customized to print only certain information in a summary.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Lets reviewers easily view selected documents associated with the request and stored in the system. Audio and video files must be downloaded separately.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests, demographics, or potential conflicts of interest, as the system does not store reviewer profiles.
- **Comment Sharing Among Reviewers**: Lets you choose whether to let reviewers see each other's comments and grades while reviews are in progress. These can be anonymous or names can be attached to scores.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner is alerted through the system but not via email when all reviews have been completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. This system includes a fully integrated version of GuideStar Charity Check and verifications are stored in the database for future audit purposes. It's not possible to perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations, but not individuals, against standard OFAC and other terrorist watch lists within the grants management system itself, via GuideStar integration. It's not possible to perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application with the fields that you want by creating an external merge.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step .
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.

- **Electronic Signatures**: The system supports simple, checkbox-only electronic signature forms.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Tablets can be supported through PDFs.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent via blind copies, but rather individually to minimize the risk of being flagged as spam.
- **Email Template Flexibility**: Lets you create an unlimited number of email templates, but you cannot mail-merge fields into system email.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on a limited number of certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Organization information is saved within the system, and you can view and report on the history of all grants to a particular organization.
- **Tracking Business Units**: Lets you track individual business units under a larger organization with some modifications.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you or to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated emails for each grant, but not mail-merge documents. You can manually upload mail-merged documents.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: It's not possible to "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.

- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines. It's not possible to pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, through the use of custom fields.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system does not support user groups to collect uniform data.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually. The payment schedule workflow has been updated.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but not print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Does not easily support payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor reports that this feature is forthcoming.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in U.S. dollars.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but the system only flags contigencies rather than enforcing them.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information.
- **Payment Notes**: It's possible to add a comment on a note.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: To void payments or put them on hold, you would need to create a custom status. To refund payments, you would need to create a negative payment amount. It's not possible to create or update payments in batch or track quid pro quo or in-kind payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.

- **Budget Amount Reporting**: Lets you enter only a single budget amount for your whole organization. You can see a program's budget, but not report on it.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes, although this could potentially be managed through a custom report.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items are not automatically tied into grant requests.
- **Program-Related Investments**: The vendor has customized the system to track interest repayment on PRIs for several clients.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users.
- **Grant Summary Tracking**: You can define codes and see them in reports, and these codes can be rolled up hierarchically—for example, to show grant money paid to each Education sub-program as well as total Education grants—by creating hierarchies within groups.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system contains a standard report template to easily align data with the Foundation Center eReporting format.
- **Automating Reports**: Lets you set up reports to automatically run, but not be sent out to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: The system does not provide "dashboard" views that summarize the grants currently relevant to each individual user, and the system does not have the ability for users to create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides a different internal interface to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Dashboard views are available but are not customized to the individual logon.

- **Users Task Lists**: Does not provide users a “task list” upon sign on.
- **Task Assignment**: Lets you assign reviews to users within the system, but no other tasks.
- **Board/Management View**: Provides a standard focused, roles-based view for board evaluators, but not for management.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export most data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device’s web broswer.
- **Grant Information Review from a Mobile Device [**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device’s web browser.
- **Data Integrity**: The vendor’s security protocols include vulnerability testing, a redundant server replicated in real time, daily backup, strict firewalls, and a hosting provider that is SSAE 16 compliant.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields, but there isn’t an audit log of changes.
- **Internal Tracking Fields**: Lets you add custom “internal tracking” fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost, including visual design aspects.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn’t often do so.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor does not provide extensively customized solutions.
- **Support for Multiple Languages**: Lets you define custom language sets for applicants and reviewers based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface has been streamlined to be more visually appealling, and remains clean with fields that are neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn’t have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems, though batch functionality has streamlined some repetitive tasks.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support without additional cost.
- **Online Support**: Vendor provides email support without additional cost, as well as an online knowedgebase and customer community that is searchable.
- **Manuals and Documentation**: Vendor provides online documentation, contextual help, and tutorials for board, applicants, and staff reviewers.

- **Training**: The vendor provides initial training via the phone and web demos included in the one-time setup fee. Through a series of online meetings, they teach a system administrator how to set up online data collection forms. In-person sessions can be scheduled for an additional fee.
- **User Support Forums**: User support forums and discussion groups are available, including the Idea Lab, where clients can post product suggestions. The vendor offers a national users conference and has active local users groups in 14 regions.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since January 2006. Grant Lifecycle Manager has been in use since February 2007.
- **Client Base**: The vendor reports that they have about 514 clients. Client breakdown by foundation type is 50 percent private, 15 percent community, 10 percent arts and humanities, 10 percent government, 5 percent corporate, 5 percent medical research, and 5 percent other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 133
- **Percent of Survey Respondents Who Would Recommend the System**: 97 percent

FUSION LABS GE/SPECTRUM

Fusion Labs GE/Spectrum is a standalone system that includes several facets, including the GrantedGE grants management system and either the PROFFER 4 online application management, which integrates with Blackbaud's NetCommunity, or the Spectrum online web portal for those who choose not to use NetCommunity. The system can integrate tightly with other Blackbaud products, too, such as The Raiser's Edge and The Financial Edge. However, unlike the earlier GrantedGE system, those external products are not required for GE/Spectrum. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Labs' online form modules support reasonably sophisticated formatting of forms. The system now includes application branching, more sophisticated eligibility quizzes, and support for multiple logons for applicants from a single organization. License costs range from around $20,000 to $225,000, based on the size of the foundation and complexity of the implementation.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories (in this system, known as characteristics), such as geographic or population-based codes, and track across specific dollar allocations.
- **Splitting Codes**: No data available.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs, as well as audio and video files.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be manually entered into the system or imported via Excel.
- **File Attachment Method**: The system saves only the link (i.e., file system path) for attached documents. Files that are uploaded as part of the online application submission are embedded in the database.
- **Batch Updates**: Except for application status field, does not let you perform batch updates of defined coding and other fields.
- **Taxonomy**: The vendor maintains a commitment to implementing an industry-standard taxonomy within the system should one become widely used.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program through the use of conditional forms on an online application.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor and that are fully configurable to the look and feel of the foundation's website.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports five application stages, which can be of virtually any kind, and supports a multiple-choice eligibility quiz.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees and applicants cannot transfer account and history to a new staff contact, but could contact the grantmaker to make that transfer.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can format applications using groups of questions, conditional fields, and multiple pages, but not rich text.
- **Spell Checking**: Grantees cannot spell-check applications, unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections, and the system prompts applicants to save the application at intervals.
- **User Registration**: System registration can follow standard best practices—applicants enter email address and password and are sent a confirmation email (though the process is largely client-defined). You can set access for applicants to access different parts of the system at the point of registration.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system does not include a virus scan for files uploaded to the system. The administrator can specify what file extensions you will allow to be uploaded, and their maximum limit.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, but PROFFER online functions, which include the Blackbaud NetCommunity product, can be configured for mobile or tablet devices.
- **Unified Accounts**: Applicants or grantees can manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: A grantmaker can see an application in progress once it is saved within the system, but a grantmaker cannot provide comments or collaborate with the applicant before it is submitted.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website and offers a basic form building wizard.

- **Character and Word Counts**: The system includes character but not word counts for application questions. Grantmakers can set and adjust character limit for any field.
- **In system Help**: A grantmaker can customize hover-over help text for any field in an online application.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information, but not filter or sort by program or date.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports customizable scoring schemes for different programs and for each application.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. You can track reviewers and applications by geography or other criteria defined by grantmaker for making assignments, and save set panels of reviewers to assign them.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary and aggregated statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, but only within the system, not via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against the GuideStar database and flags those not listed. The system automatically fills in related fields for legal name, EIN, and tax status, but does not include date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s), and you cannot perform checks or updates in batch.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, but the system provides a link out to the SDN list.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.

- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and which are time stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent as blind copies but as one-to-one.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and edit individual emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports, but through third-party integration at additional cost.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission, but through third-party integration with NetCommunity at additional cost.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, but through third-party integration with NetCommunity at additional cost.
- **Outbound Email Method**: Emails can be sent through third-party email services, but at additional cost. Otherwise, emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system does not include spell-check for emails, however templates on which emails are based can be spell-checked, and merge fields can be spell-checked.

Relationship Management

- **Tracking Individual History**: You must delete former grantseeker contacts from organizational records.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization, although you could do so via reports.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field, but requires integration with NetCommunity at additional cost.
- **Contact Synchronization**: System does not automatically synchronize Outlook contacts, but vendor can provide a utility to update email addresses. Integration with NetCommunity provides more Outlook functionality, at additional cost.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, and can set up default requirements based on grant types.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, but it's a system-generated email and you cannot merge requirements information into it.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Grantees can submit progress report information through online data fields.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor works with clients to configure a suggested format during implementation.
- **User Groups**: The system does not currently support user groups to collect uniform evaluation data consistent with other groups, although the vendor would support such a strategy if clients asked for it.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Allows users to design and develop a custom check, which can be printed from within the system, but requires a real-time interface with a financial system to ensure that there is a financial audit trail.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: GE/Spectrum can be integrated with The Financial Edge and Quickbooks in real time. The vendor has experience in integrating the system with other accounting systems.
- **Automated Payment Approval Process**: Limited support for payment approval workflows.
- **Multi-Currency Support**: Only supports grants in U.S. dollars, although the vendor reports support for multiple currencies is forthcoming.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies, although the vendor reports support for multiple currencies is forthcoming.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.

- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, make refunds, and place payments on hold. Has the ability to update payment details (e.g., general ledger account, fund, etc.) and ability to create payments in batch as an encumbrance batch. There's no current ability to track quid pro quo or in-kind payments, although you can track program-related expenses.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount paid out in a particular year, and not the total amount awarded in a year.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items do not automatically create grant requests.
- **Program-Related Investments**: The system supports grant-related loans, but not interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Can make process of running reports easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: Does not contain report templates to easily align data with reporting standards used by the sector.
- **Automating Reports**: Reports are run in Microsoft Reporting Services, which allows reports to be run automatically according to a pre-defined schedule.
- **Visual Reports**: Reports are run in Microsoft Reporting Services, which allows reports to include charts, graphs, etc. Specific standard reports are set up to display graphs and charts.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. System administrators can create multiple unique dashboards for users.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Does not provide a simpler interface for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**:
- **Users Task Lists**: Provides users with different "to-do" lists when they sign on to the system. You can configure these lists for different tasks (assigned, incomplete, overdue, etc.).
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members, through the Proffer online component.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides a direct ODBC database connection to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: Security is handled by a secure login/password environment, with specific data within the database encrypted to provide added security. An audit trail for key data modifications allows tracking of changes to the database.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you create custom fields that have similar permissions to system-standard fields, and tracks their creation and history in the audit trail.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will provide custom plug-ins, at an additional cost, to meet a client's specific needs, but most customizations are built directly into the base system.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, unless existing tables are modified.
- **Support for Multiple Languages**: There is no ability to define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support**: Vendor provides unlimited email support as part of the yearly maintenance fee, but no other online support options.
- **Manuals and Documentation**: Vendor provides a PDF manual.
- **Training**: Vendor offers monthly classes. Also performs annual regional training at no charge.
- **User Support Forums**: Vendor provides an online forum where users can communicate with each other.

Installation and Maintenance

- **Installation and Maintenance**: To use the system, the clients need MS SQL server software, Windows Server, and Windows Terminal Services (for remote access). The system can be hosted by various third-party services (including Fusion Labs and Blackbaud). While GrantedGE requires The Raiser's Edge, The Financial Edge, and NetCommunity for certain functionality, the GE/Spectrum product is self-supporting on these functions.

Vendor Background

- **History**: The vendor has been in business for over 20 years. The GrantedGE product has been in use since 2005 and the new version of GE/Spectrum has been in general use since 2012.
- **Client Base**: Fusion Labs currently has approximately 120 clients for GE/Spectrum. The breakdown by nonprofit organizations is 5 percent to 10 percent private foundations, 70 percent to 80 percent community foundations, 10 percent to 15 percent religious foundations, 5 percent to 10 percent other foundations (family, research, etc.).
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 8
- **Percent of Survey Respondents Who Would Recommend the System**: 42.9 percent [Note that this represented 3 out of the 7 people who answered this question.]

MOSAIC GEMS

Mosaic's suite of software—which includes GEMS, STARS, and other customized implementations—is designed to support many facets of the human services sector besides grants management, and provides powerful cabilities in the realm of grant evaluation and contract-based budgeting. The system is used predominantly by government agencies throughout the United States, and in 29 countries in the developing world. The vendor provides consulting services and highly customized implementations for its customers to help connect grants and improved outcomes with an organization's grantees. The software has a unique means of personalizing the interface, and it's easy to turn features and whole areas of the system on and off. Online application and progress report features are strong, although it's not as streamlined as other systems in facilitating the viewing and printing of applications and attachments for reviewers. The system does not include a means of checking tax or OFAC status, although the vendor is willing to add such features during implementation. There's some facility to send messages within the system, but not to support letters or email merges. However, most data is exportable to Excel, and the system's powerful reporting capabilities are a plus. Support options—both online and phone—are also quite extensive. The vendor reports that pricing is determined based on the specific size and needs of the organization in question. For a small foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $32,000, with a lower ongoing annual cost for maintenance and support. For a larger foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $155,000, with a lower ongoing annual cost for maintenance and support.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Grant information cannot be tracked by program cycle or board meeting date, but information about either could be tracked by creating dates within the system calendar.
- **Tracking by Categories and Codes**: You can track by categories, such as geographic or population-based codes, with specific percent or dollar allocations, but the system would require some customization to do so.
- **Splitting Codes**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be entered into the system by scanning the application and uploading the PDF as a document-upload data field, which would still enable the review workflow, or else by having a grantmaker log in as a grantee to do so.
- **File Attachment Method**: The system stores attached documents in the database as either objects or links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields through an import mechanism.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the vendor would be willing to build one upon request.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system does not allow for both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can use skip logic to branch.
- **Application Branching**: Grant application forms can use skip logic to branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees and applicants cannot transfer account and history to a new staff contact, but could contact the vendor or grantmaker to make that transfer.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Duplicate Accounts**: The system does not check the email address of each new registrant to make sure it doesn't already exist in the system, but a grantmaker can review applicants to look for duplicates on the back end of the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but the message must be customized by the vendor. There can be a message center module.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: The vendor must reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant only by running a report. The preview packet does not include uploaded documents.
- **Security Scan**: The system does not have a virus scan or security feature to prevent malicious files from being uploaded onto an application or downloaded on to the system, but this could be facilitated by adding a virus scanner to the document management system through the API.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet.
- **Unified Accounts**: There's no current means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: The system does not currently have the ability to let applicants work on a proposal, submit, and allow reviewers to comment/make suggestions, and work back and forth until a proposal is complete, after which the proposal is locked, but the vendor reports that this could be customized.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms with your logo.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and does not display how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the vendor. Grantees and applicants can contact the vendor directly for technical assistance.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: External or internal reviewers cannot easily print grant summaries or full grant information by program or by date without running a report.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different, customizable information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest, but does not provide any specific functionality to help you assign applications for review based on these criteria. The system lets you capture geographic as well as other criteria defined by the grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either via email or within the system.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, though the vendor is willing to build integrations to do so.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, though the vendor is willing to build integrations to do so.

Letters and Board Dockets

- **Default Print Format**: Does not support printed summaries of grant applications.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.

- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: You cannot view or customize individual letters within the system before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not currently support electronic signatures.
- **Printed and Electronic Templates**: Does not include templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria through an internal communications log for users of the system.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: There's no in-system email, but there is a Message Center module that can be used to track triggered system email notifications, allow users to compose messages, customize signatures, attach documents to communications, and select from a predetermined list of contacts.
- **Spell Checking**: Lets you spell-check for all system messages in the Message Center module.

Relationship Management

- **Tracking Individual History**: Lets you track the relationship of an individual associated with a grant even if they leave, by enabling a feature which identifies active and inactive users of the system.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization.
- **Record of Correspondence**: Stores a record of all system-generated internal messages for each grant, but not other communications.
- **Call and Email Logging**: Does not let you note interactions with a grantee without exporting a report.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.

- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not, and compare them to logic models.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: Lets you maintain user groups within the system in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests or print checks direcly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you manually note what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including GreatPlains, at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Can be configured to support grants made in multiple currencies.
- **Multi-Currency Reporting**: Can be configured to report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount paid out in a particular year, and not the total amount awarded in a year. Budgets are tied to contracts.

- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, as well as for contractors and subcontractors.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discrete.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can be connected to grant requests.
- **Program-Related Investments**: The system does not have support for interest repayments on PRIs, although this could be configured.

System Querying and Reporting

- **General Reporting Approach**: The system is designed to make running reports easy enough for casual users to run queries independently. Mosaic has its own reporting engine.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, date, or program, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down on standard reports through the advanced filter capabilities.
- **Attachment Searching**: Does not let you search within attached documents, but does provide a robust document management system to help manage attachments.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, or IATI.
- **Automating Reports**: It's not possible for reports to be set to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts, graphs, and maps.
- **Individual Dashboards**: The system provides "dashboard" views which summarize the grants currently relevant to each individual user, and offers the ability for users to create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions. You can also assign users to specific programs.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.

- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members, although one could be configured.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides a direct ODBC database connection to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices, but the system interface is mobile responsive.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device, but the system interface is mobile responsive.
- **Data Integrity**: The vendor's security protocols include a redundant network of servers, replicated in real time; daily backup; substantial activity logs and audit trails; firewalls for both application and database servers; encryption for sensitive data; and isolated session containers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you create unlimited custom fields, which can be placed in most places throughout the system, with the same permissions as other fields. Creation of the fields is tracked in the audit log of the whole system.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's possible to define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but they must look through a considerable list of options to find them.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides user support and data coaching to all users via a toll-free helpline (in addition to online support options detailed below). Support is available between 6 a.m. and 6 p.m. PST on regular business days. For emergencies, all systems are also supported by a 24-hour emergency support line.

- **Online Support**: Vendor provides user support and data coaching to all users via email, online chat, and remote desktop technology. Support is available between 6 a.m. and 6 p.m. PST on regular business days. Each system has a help section dedicated to providing support, which provides an email address for specific questions, an online form to submit inquiries, and, in addition, the vendor provides live, remote assistance through an instant chat function, which is accessible to users directly through the system.
- **Manuals and Documentation**: The vendor typically provides manuals designed for each user type, including easy-to-understand text and images. These manuals are available online through a wiki-style online manual platform and are integrated in the system. Video trainings designed for each user type, similar to manuals, are available online using a professional video hosting site and are integrated in the system. The vendor also provides cheat sheets and quick guides.
- **Training**: The vendor provides initial in-person live training sessions during the release of the system for all user types across agencies. When major updates are introduced in the system, additional in-person trainings are scheduled. Additionally, they offer remote training via webinar, specifically designed for a specific user type, function, or task, and when updates and new features are added, additional remote trainings are offered, tailored to their clients' needs.
- **User Support Forums**: There are currently no user support forums or discussion groups.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: Mosaic has been in business for 13 years, beginning in 2000. GEMS has been in use by clients for 13 years.
- **Client Base**: The vendor reports that they have about 32 clients. Breakdown by foundation type is 72 percent government, 23 percent private, and 5 percent family.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it. The vendor also reports that they invest a significant amount of resources in research and development both for technology and for domain expertise.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 1
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

GOOD DONE GREAT GRANT MANAGEMENT SYSTEM

Good Done Great's Grant Management System has undergone significant changes in the past couple of years, including a migration from Intuit's QuickBase platform to its own proprietary backend infrastructure. It remains an affordable hosted solution with strong functionality. Online forms built in Grant Management System can be matched to the look and feel of an organization's website. Facilitated by an intuitive navigation scheme, information collected online can easily be managed, viewed, and reported on by grants administrators. Letter and email templates can be custom-formatted to organizational standards, and can contain mail-merge fields, which helps with large mailings. Improvements include support for multiple currencies and email delivery statistics. A small foundation would pay about $10,000 for implementation of the system, and about $11,800 each year, which includes basic training. A larger foundation would pay around $28,500 for implementation, and $42,870 each year, which would include custom, on-site training.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track by specific percent or dollar allocations.
- **Splitting Codes**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, PDFs, photos, and audio and video files.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle. The system also includes a global full text search of the database.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering application information into the grant record. The system also includes the ability to import information from PDFs into the database.
- **File Attachment Method**: The system uploads files to the the vendor's own servers and retrieves them from there. The vendor also offers additional cloud storage.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields, as well as set them to run at intervals and send out to other systems.
- **Taxonomy**: The vendor has supported industry-standard taxonomies such as that of the National Center for Education Evaluation.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor. The system offers a formatted portal page, and you can control its look and feel.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There is no ability for grantees or applicants to transfer their account and history to a new staff contact, although a foundation staffer could do so from the back end.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections. Additionally, the system warn applicants if they do not save manually before navigating away from the page.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet with a different interface.
- **Unified Accounts**: Applicants or grantees cannot manage all grant information for all of their funders in the system with a single logon, although the vendor reports this is on the product roadmap.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. You can also fully match the style sheet of your foundation's website.
- **Character and Word Counts**: The system includes character and word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the foundation staff.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
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- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information as a PDF. Audio and video attachments can be viewed within the system.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes are customizable, and can be number-based or narrative.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. Lets you track reviewers and applications by geography or other criteria defined by grantmaker for making assignments. You can also create and save review committees to assign to requests.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either by alert within the system or via email based on configuration.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. The system checks against GrantR (a proprietary registry), and can also import PDFs directly from that service. Provides updates based on the revocation list. The tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. The OFAC check includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include, as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.

- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and which are time stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats, including a mobile-enabled interface.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. You can choose to have a "no-reply" email address or reply to the sender. Group emails are not sent as blind copies but as one-to-one.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. It's not possible to edit individual emails after they have been merged.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports through a third-party application, Mandrill.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam. You can set the emails to display a "reply-to" address from the foundation, rather than the vendor.
- **Spell Checking**: There's no dedicated spell-check for emails generated within the system. You can use your browser's spell-check.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual no longer associated with a grant within the system's audit trail, and the individual will not show up as an active contact for communication. However, the individual no longer appears on the organizational record of the grant.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's possible to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through segmentation.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: It's not possible to automatically synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and lets you merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor works with clients at the time of implementation to include suggested formats.
- **User Groups**: The system has some ability to support user groups within the system to help collect uniform evaluation data across groups.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, and lets you print checks directly from the system using templates or by integrating with the accounting system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions, and the vendor can handle payment disbursements for you at additional cost.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but the vendor could build integration with accounting packages for additional cost, so long as there is an API available for the accounting system chosen. The vendor also suggests batch uploads for data transfer.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.

- **Payment Notes**: At the time of the demo, you needed to add a custom field to track payment notes, although the vendor reports that this feature has now been added to the system.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, refund payments, and place payments on hold through statuses with workflows associated with them. Lets you track quid pro quo and in-kind payments, through configuration. It's not possible to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can choose whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Lets you set up "what-if" scenarios by setting up a grant in a pre-committed status and reporting on it.
- **Budgeting and Grant Requests**: Budgeted line items can be connected to grant requests.
- **Program-Related Investments**: There's no current support for interest repayments on PRIs, but the vendor is willing to configure this for clients if needed.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is designed to be easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments.
- **Standard Reports**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format and Reporting Commitment hGrant format. Also contains the Cultural Data Project data set.
- **Automating Reports**: Reports can be set to automatically run and send to individuals and groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.

- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards and tabs within the system.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members, which can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system. ODBC functionality can be set up for additional cost. The vendor also reports built-in secure RSS feeds for all data.
- **Mobile Device Application Review**: Provides an interface specifically designed to see, code, approve, and add review comments from a mobile or tablet web browser.
- **Grant Information Review from a Mobile Device [**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity**: The vendor reports that they have been certified by TRUSTe, and that they use ACLs, two-factor authentication, and external security auditing tools on a daily basis to ensure that resources are properly secured. The system is hosted within the Amazon cloud services, and the system leverages both encryption and SSL sessions for sensitive data exchanges.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you create unlimited custom fields with the same permissions as custom fields. The creation and change is tracked within the audit log for the entire system.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program. The vendor reports that they have already worked in 10 different languages.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out, and has recently undergone some design improvements.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support as part of the yearly maintenance fee for foundation administrators only. Support packages for other foundation staff, applicants, and reviewers are available for an additional fee.
- **Online Support**: Vendor offers an online support system accessable from within the software using a Feedback tab, which is available for foundation staff. Online support for grantees is available at additional cost.
- **Manuals and Documentation**: Vendor provides online knowledgebase articles.
- **Training**: The vendor provides initial training in person or online for a fee outlined in the proposal. Training for administrators and end users is available at additional cost.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2008. Good Done Great has been in use by clients since 2008.
- **Client Base**: There are 141 grantmakers currently using the Good Done Great system. The breakdown of foundation type is 44 percent community foundations, 32 percent private/family, 20 percent corporate, and 4 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 13
- **Percent of Survey Respondents Who Would Recommend the System**: 30.8 percent [Note that this represented 4 out of the 13 people who answered this question.]

GRANTSTREAM GRANTRIGHT

Aimed primarily at corporate foundations, GrantRight is an Online hosted option with a web-based interface. It has a particular strength in internal grant tracking, payments, and budgeting features. However, it's somewhat limited in online application and progress reporting. For instance, it can only support an eligibility quiz and one other application phase, and does not offer any ability to track data from grantee progress reports without additional customization. Nearly anything is customizable—including sophisticated application review workflows and forms—but almost all customization must be done by the vendor, potentially at additional cost, including customizing values in dropdown boxes and creating letter and grant summary templates. Ad hoc reports are flexible and easy to format. Standard reports can be easily modified by those familiar with SAP Crystal Reports. GrantStream has extensive experience with corporate clients and is willing to heavily customize GrantRight, which could make it attractive to corporate foundations with specialized needs. Annual recurring costs for GrantRight can be between $23,000 and $30,000, $19,200 to $25,000 with first year setup fees generally starting around 30,000 to $34,000.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not specific percent or dollar allocations without customization.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting, but requires customization, possibly for a fee.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the vendor can configure the system, possibly for a fee.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, but the vendor must set up application forms for you at no additional cost.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: The vendor will configure eligibility quizzes to branch to multiple applications based on the applicant's responses.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports two application stages: an eligibilty quiz and one other stage. Support for additional stages is possible via customization at additional cost.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: A grantee must contact the grantmaker to change their contact information.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Duplicate Accounts**: The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system, and duplicates can also be identified on the back end.
- **Viewing Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but that message can't be customized.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, but the vendor must perform this formatting. Basic applications are included in the implementation fee, but more complicated forms may be created at additional cost.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections or logs out of the system.
- **User Registration**: A system-assigned user ID and password is assigned to each applicant user upon starting an application, these credentials are not self-selected by the applicant.
- **Lost Credentials**: Lost credentials can easily be reset by the grantmaker, but not by applicants.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process. The grantmaker, however, must opt to allow post submission viewing and printing.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them, but not after submission.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system from a unified account.
- **Grantee/Foundation Collaboration**: There's no means for an applicant and reviewer to work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, but the vendor must perform this customization, possibly at additional cost.
- **Character and Word Counts**: The system does not allow users to set and adjust character or word limits for application questions. The vendor could set and adjust character limits if requested, possibly for an additional fee.
- **In system Help**: Applicants can contact the vendor directly for tech support from a link on the application form.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Once an online application has been submitted, you cannot reopen it to request more information from the applicant.
- **Printing Grant Summaries**: Internal reviewers can easily print grant summaries or full grant information, but external reviewers would need to request that information from the foundation staff. The vendor can configure the system at implementation to allow users to print grant summaries by program or date.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, but requires customization at additional cost. There is no ability for admin users to build in overrides to the workflow based on permissions.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, but this requires customization, possibly at additional cost.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes are defined by the vendor at implementation.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, but requires customization, at additional cost.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score, if configured to do so by the vendor at implementation.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified by email when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. Checks against U.S. IRS database as well as Canadian Revenue database, and a British registry. The system can auto-populate related fields on the organization record based on information from the IRS database. The system can be configured to check other 501(c) types, in addition to 501(c)(3) nonprofits.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos, but the vendor has to perform these customizations, possibly at additional cost.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos, but the vendor has to perform these customizations at implementation.

- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them. To do this, you have to export the letters from Crystal Reports to Word and then make any changes.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: There is no support for electronic signatures in the system.
- **Printed and Electronic Templates**: The system includes templates for print and email formats.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual, but not to a group of people at once.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: Lets you attach files to emails sent to individuals, but not groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization if configured to associate multiple contacts with an organization.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log. A more detailed logging of calls and external emails can be configured by the vendor, possibly at additional cost.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, but cannot set up any default set of requirements that applies to all grants without customization, possibly at additional cost. The vendor reports that they are moving away from heavily customized single-client implementations of the system.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online.

- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. Reminder emails can include merge field information about the organization, but not from the specific requirement.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff, but at the time of review, requires customization, possibly at additional cost.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, but at the time of review, this requires customization, possibly at additional cost.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system does not currently have the ability to support user groups in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors), but requires customization, possibly at additional cost.
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, possibly at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process, but without a configurable workflow. The vendor must set up workflows, possibly at additional cost.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: The system provides the ability to void or place holds on payments in the system, create payments or update payment details in batch, and track in-kind and quid prop quo payments. Users cannot refund payments in the system, but can post corrective negative payments to reflect refunds.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items cannot be set up to automatically create grant requests.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some, but not all, reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Program reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: The system provides the ability to create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: The system cannot provide "dashboard" views that summarize the grants currently relevant to each individual user, or let users create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs, but this requires customization, possibly at additional cost.

- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are available.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes, but this customization must be performed by the vendor during implementation.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. Custom fields are set up by the vendor at implementation.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use, but this customization must be performed by the vendor, possibly at additional cost.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but some screens are broken into multiple smaller frames that while adjustable, can each require signficant vertical scrolling to see the information you need.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support from 8 a.m. to 6 p.m. EST, Monday through Friday, as part of the yearly support and maintenance fee.
- **Online Support**: Vendor provides unlimited email support as part of the yearly maintenance fee. No online or chat support is available for the system.

- **Manuals and Documentation**: Documentation is available via the help pages of the application. Application forms include guidance for applicants. No PDF or hardcopy manuals are available.
- **Training**: The vendor provides initial training in person or via the internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: User support forums or discussion groups are not available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2000; GrantRight has been in use since 2000.
- **Client Base**: The vendor reports that they have about 70 clients. Breakdown by foundation type is 90 percent corporate and the rest other types of grantmakers.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 2
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

MICROEDGE GIFTS ALTA

Beginning in 2011, MicroEdge has debuted a new user interface and set of functionality for the installed package called GIFTS Alta, which draws on the infrastructure of the very popular GIFTS but adds more functionality in terms of system personalization, dashboards, and workflow management. The vendor reports that GIFTS is and will continue to be supported, but that new clients looking to implement an installed system will purchase GIFTS Alta. (See our review of GIFTS on p. 186. For a hosted option, the vendor also offers GIFTS Online, reviewed on p. 195.) GIFTS Alta still relies on some modules at additional cost to extend its capabilities, like IGAM for online grant applications and reporting and ReviewerConnect to collect and track reviewer data, but has incorporated some key processes into the base product, like Microsoft Office integration and batch updates. GIFTS Alta shares its predecessor's strong internal tracking features, like the ability to create printed letters, categorize with codes, and track payments. The new version of the product also allows foundation staffers to create unique views to support their personal processes, and has a carousel view to faciliate a more visual representation of data within the system. A friendly new ad hoc reporting tool, custom workflow functionality, and customizable dashboard system also help make data more accessible throughout the system. A small foundation could expect to pay about $37,000 in the first year and then $7,320 per year for GIFTS Alta plus IGAM. A larger foundation might pay $84,000 in the first year, and then $16,800 per year for GIFTS Alta plus all pertinent modules.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track the specific percent or dollar allocations for each.
- **Splitting Codes**: No data available.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs, as well as video and audio files. Large files may require SharePoint.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The system can be implemented with an industry-standard taxonomy. The vendor reports that they are working with the Foundation Center to define a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you see easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.

- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor, but requires IGAM module at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program, but requires IGAM module at additional cost.
- **Eligibility Branching**: The system allows for eligibility quizzes which can branch to multiple applications, but requires IGAM module at additional cost.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but this requires IGAM module at additional cost.
- **Support for Multiple Stages**: Supports a three-stage application with an eligibility quiz, Letter of Intent stage, and proposal stage. Grantmakers can also create as many status report stages as they'd like.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required. The data is brought automatically into a staging area in the core system, where it can be reviewed by an administrator and either promoted into the database or declined.
- **Multiple Logins for Grantees**: IGAM supports only one grantee login per grant application, but the original applicant can share the application with anyone they choose via email to view the application, transfer ownership of the application, and make edits to the application or reporting requirements.
- **Transfer of Account and History**: A grantee or applicant could transfer their account and history to another staff contact from the front end one by one. A foundation staffer can transfer the entire historical account to a new user.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system does not check the email address of each new registrant to make sure it doesn't already exist in the system, but there is a process for grantmakers to review applicants to look for duplicates. The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Possible duplicates are flagged for the grantmaker to choose whether to create a new account, merge with an existing account, or reject.
- **Viewing Status Online**: Applicants can view their status online, as well as other pertinent information like reporting requirements and payments.
- **Custom Confirmation Messages**: When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the web interface.
- **Application Formatting**: Grantmakers can format using HTML. Users can upload images to brand the header, footer, and side panel content. You cannot embed a video in an application form, though it supports the ability to link to a video using HTML. Applicants can upload any type of files during the application requirements process.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system performs a virus scan to prevent malicious files from being uploaded onto the application at the point of upload. The vendor also enlists a third party to perform periodic vulnerability tests.
- **Mobile Device Application Access**: While the system does not explicitly support the application process via mobile devices—through responsive design, for example—application forms can be accessed via mobile browsers.

- **Unified Accounts**: Grantees have separate accounts for each grantmaker using the system.
- **Grantee/Foundation Collaboration**: The system can allow foundation staffers and applicants to collaborate and comment on an application before submission, but an applicant would need to transfer ownership to a foundation staffer in order to let the staffer make edits.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. The system includes the ability to do advanced online form design, such as HTML, columns, and vanity URLs.
- **Character and Word Counts**: The system includes word counts for application questions, which can be set and adjusted by a staff user for any field, but does not include character counts.
- **In system Help**: In-system help is available and customizable throughout the online application system. The vendor asks that the client be the "first line of defense" for technical questions from applicants, but will take on questions when they are escalated.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Internal reviewers can easily print grant summaries, but attachments must be printed out one by one. An additional cost module, ReviewerConnect, is required to extend this functionality to external reviewers.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires the ReviewerConnect module at additional cost.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system, but they must open each attachment one by one.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. The vendor has updated the workflow ability of the system substantially, and allows each user to customize workflows specific to their account.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be customized.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, along with tracking reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. But aggregation is possible only through custom fields or external spreadsheets.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed. External reviewers can be notified when an application is accepted.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks EINs against IRS Master Business File, flags those not listed as 501(c)(3) nonprofits, and provides updates based on the revocation list. You can perform this check in batch. The system checks for secondary tax status and works for both individuals and organizations, and includes an audit trail with time and date stamp.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists, including the SDN list, within the grants management system itself. The system checks both individuals and organizations and includes an audit trail with time and date stamp.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos. The system has an improved interface to facilitate this process.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. The system has an improved interface to facilitate this process.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step. The system has an improved interface to facilitate this process.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket. The system has an improved interface to facilitate this process.
- **Electronic Signatures**: The system supports electronic signatures through a basic checkbox. The vendor reports that some clients use third-party solutions to collect and verify electronic signatures.
- **Printed and Electronic Templates**: The system does not include templates designed specifically for electronic or tablet view, although it does include support for PDFs readable on tablet devices.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. You can define whether to send group emails as blind copies or individually.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and lets you edit emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Only lets you see read receipts for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system.

Relationship Management

- **Tracking Individual History**: Lets you define that individuals are no longer with an organization by adding end dates to their affiliation with the organizaiton. You can also deactivate the master contact record. The former contact still appears on the record, but will not be sent communications. A minimal audit trail of these changes appears.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.

- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization by associating them with affiliation records.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from Outlook and automatically attach them to contact, organization, request, or activity records.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees, but in order to publish them online requires the IGAM module at additional cost.
- **Branching for Evaluation**: Lets you create a variety of reporting templates, which can "branch" to foster data collection, but requires the IGAM module at additional cost.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online, but this requires the IGAM module at additional cost.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and lets you merge information from requirements into reminder emails. You can schedule these emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports, but this requires a module at additional cost.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs), but this requires a module at additional cost. During implementation, the vendor works with clients to include suggested formats.
- **User Groups**: Lets you configure a template of metrics to collect data based on grant program.
- **Payments**: Grant Requirements and Evaluation
- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, and lets you print checks directly from the system through a Checkwriter functionality, or if integrated with an accounting system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with several external accounting packages. Many major packages are supported and the vendor could build integration for other packages at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, make refunds, place payments on hold, update payment details, and create payments in batch, and track quid pro quo and in-kind payments.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount paid out in a particular year, and not the total amount awarded in a year, but this requires add-on functionality at additional cost.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but requires add-on functionality at additional cost.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but requires a module at additional cost.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year, but requires add-on functionality at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, requires add-on functionality at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires add-on functionality at additional cost.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Lets you automatically create a pending request for a budgeted line item.
- **Program-Related Investments**: There is no defined functionality to support PRIs, but the vendor reports that this could be accommodated by changing the grant amount when the interest repayment is returned, as well as through custom fields, among other strategies.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently through the new ad hoc reporting tool.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. You can add new reports using Crystal Reports Writer or SQL, or MicroEdge will create new reports at additional cost.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, layouts, and queries without navigating a much-larger set.

- **Saving Modified Reports**: Lets you save reports or datasets that you create or modify. You can also export them to Excel, Word, Crystal Reports, HTML, or PDF files.
- **Ad Hoc Reporting**: A new ad hoc reporting tool allows for more streamlined processes, but the original GIFTS interface is also available for users who prefer that layout or want to work with Crystal Reports. You can define the dataset, data columns, sort order, and formulas to be included on each of these screens. You can export the data into a custom report template that can include logos and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down on reports.
- **Attachment Searching**: It's not possible to search the contents of file attachments.
- **Standard Reports**: Includes the Foundation Center eReporting Excel format.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation, like charts and graphs, but not maps.
- **Individual Dashboards**: Provides "dashboard" views which summarize the grants currently relevant to each individual user. Users can create their own multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions, but only through a separate web interface provided by a module at additional cost.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis, but only through a separate web interface provided by a module at additional cost.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user, and allows users to create multiple unique dashboards.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor reports both native file system and database tools external to the system that provide backup and redundancy capability, and that the vendor works to ensure that their clients are following best practices for their use.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system includes unlimited custom fields, and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost. The new interface allows for better ease of personalization.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Within GIFTS Alta, you can choose to have the system display any language based on a Latin character set. IGAM supports custom language settings for programs in French, Portuguese, and Spanish.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out, and has been extensively updated and modernized.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: The vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support**: The vendor provides unlimited email support as part of the yearly maintenance fee, and offers a client portal, which includes training articles and video-based training on specific tasks and topics. Monthly online webinars are also offered.
- **Manuals and Documentation**: Documentation is provided via manuals and a CD-ROM, in addition to online resources.
- **Training**: The vendor provides initial training in person at the clients' site or at MicroEdge's New York office, at additional cost, and additional training sessions can be scheduled in person or online. Online training courses are offered for the core system and all of its modules. Online training classes offer targeted learning tracks designed to train users how to best work in GIFTS Alta based on their specific role, such as program staff, financial officers, grants management and executives, or other light users. MicroEdge offers a premium services program called, Client Care, which provides bundled services and training at a discount.
- **User Support Forums**: User support forums are available through the PowerME client portal, as well as an annual user conference and virtual and in-person peer group meetings.

Installation and Maintenance

- **Installation and Maintenance**: The system is installed on clients' computers and servers. Requires Windows server and a database platform, which can be Microsoft SQL Server or SQL Server Express, MS Access, or Oracle.

Vendor Background

- **History**: The vendor has been in business since 1985; GIFTS Alta package has been in use by clients since 2011.
- **Client Base**: The vendor reports that they have about 275 clients using GIFTS Alta. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 63
- **Percent of Survey Respondents Who Would Recommend the System**: 90 percent

MICROEDGE GIFTS

MicroEdge now offers a new user interface called GIFTS Alta as well as GIFTS Online in addition to the older version of GIFTS, but the latter system is still widely used in the sector. MicroEdge reports that GIFTS is and will continue to be supported and enhanced, including support for Office 2013 Professional and security improvements. However, new MicroEdge clients will purchase either GIFTS Alta or GIFTS Online. To supplement the desktop-based package, GIFTS functionality can be extended through a large selection of modules, making it easier to tailor the system to your needs—but harder to understand features and pricing. The core GIFTS functionality starts at about $19,000 in first-year costs, but a typical entry level configuration—which includes the ability to track custom fields and attach documents—is about $25,000. At this level, GIFTS offers strong internal tracking features, like the ability to create printed letters, categorize with codes, and track payments, but there is no support in the base product to collect and track reviewer data. In this core system, it's not possible to create unique views for different internal users of the system, requiring even casual users to navigate the complex interface. Adding additional modules can plug these gaps, creating a solution that's quite strong in most areas, but at a cost, running to $75,000 or more in the first year.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track the specific percent or dollar allocations for each.
- **Splitting Codes**: No data available.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs, as well as video and audio files. Large files may require SharePoint.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The system can be implemented with an industry-standard taxonomy. The vendor reports that they are working with the Foundation Center to define a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you see related records and data across records, but may require some navigating between tables.

Online Applications

- **Support for Both Individual Applicants and Organizations**: No data available.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes,

checkboxes, and text fields, without additional charges from the vendor, but requires IGAM module at additional cost.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program, but requires IGAM module at additional cost.
- **Eligibility Branching**: The system allows for eligibility quizzes which can branch to multiple applications, but requires IGAM module at additional cost.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but this requires IGAM module at additional cost.
- **Support for Multiple Stages**: Supports a three-stage application with an eligibility quiz, Letter of Intent stage, and proposal stage. Grantmakers can also create as many status report stages as they'd like.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required. The data is brought automatically into a staging area in the core system, where it can be reviewed by an administrator and either promoted into the database or declined.
- **Multiple Logins for Grantees**: IGAM supports only one grantee login per grant application, but the original applicant can share the application with anyone they choose via email to view the application, transfer ownership of the application, and make edits to the application or reporting requirements.
- **Transfer of Account and History**: A grantee or applicant could transfer their account and history to another staff contact from the front end one by one. A foundation staffer must create a new primary contact in order to perform the transfer of the entire historical account.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system does not check the email address of each new registrant to make sure it doesn't already exist in the system, but there is a process for grantmakers to review applicants to look for duplicates. The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Possible duplicates are flagged for the grantmaker to choose whether to create a new account, merge with an existing account, or reject.
- **Viewing Status Online**: Applicants can view their status online, as well as other pertinent information like reporting requirements and payments.
- **Custom Confirmation Messages**: When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the web interface.
- **Application Formatting**: Grantmakers can format using HTML. Users can upload images to brand the header, footer, and side panel content. You cannot embed a video in an application form, though it supports the ability to link to a video using HTML. Applicants can upload any type of files during the application requirements process.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system performs a virus scan to prevent malicious files from being uploaded onto the application at the point of upload. The vendor also enlists a third party to perform periodic vulnerability tests.
- **Mobile Device Application Access**: While the system does not explicitly support the application process via mobile devices—through responsive design, for example—application forms can be accessed via mobile browsers.

- **Unified Accounts**: Grantees have separate accounts for each grantmaker using the system.
- **Grantee/Foundation Collaboration**: The system can allow foundation staffers and applicants to collaborate and comment on an application before submission, but an applicant would need to transfer ownership to a foundation staffer in order to let the staffer make edits.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. The system includes the ability to do advanced online form design, such as HTML, columns, and vanity URLs.
- **Character and Word Counts**: The system includes word counts for application questions, which can be set and adjusted by a staff user for any field, but does not include character counts.
- **In system Help**: In-system help is available and customizable throughout the online application system. The vendor asks that the client be the "first line of defense" for technical questions from applicants, but will take on questions when they are escalated.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Internal reviewers can easily print grant summaries, but attachments must be printed out one by one. An additional cost module, ReviewerConnect, is required to extend this functionality to external reviewers.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires the ReviewerConnect module at additional cost.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system, but they must open each attachment one by one.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be customized.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, along with tracking reviewers and applications by geography or other criteria defined by grantmaker for making assignments through an additional module, ReviewerConnect.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. But aggregation is possible only through custom fields or external spreadsheets.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed. External reviewers can be notified when an application is accepted.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks EINs against IRS Master Business File, flags those not listed as 501(c)(3) nonprofits, and provides updates based on the revocation list. You can perform this check in batch. The system checks for secondary tax status and works for both individuals and organizations, and includes an audit trail with time and date stamp.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists, including the SDN list, within the grants management system itself. The system checks both individuals and organizations and includes an audit trail with time and date stamp.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. The system has an improved interface to facilitate this process.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket. The system has an improved interface to facilitate this process.
- **Electronic Signatures**: The system supports electronic signatures through a basic checkbox. The vendor reports that some clients use third-party solutions to collect and verify electronic signatures.
- **Printed and Electronic Templates**: The system does not include templates designed specifically for electronic or tablet view, although it does include support for PDFs readable on tablet devices.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. You can define whether to send group emails as blind copies or not.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and lets you edit emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Only lets you see read receipts for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system.

Relationship Management

- **Tracking Individual History**: In order to define that an individual is no longer with an organization, you would need to create a new contact first, and add a date to the relationship of the former contact to represent when he or she left the organization. The former contact still appears on the record, but will not be sent communications. A minimal audit trail of these changes appears.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's not possible to automatically communicate with a contact according to their relationship with the grant or organization.

- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from Outlook and automatically attach them to contact, organization, request, or activity records. Contact Synchronization: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees, but in order to publish them online requires the IGAM module at additional cost.
- **Branching for Evaluation**: Lets you create a variety of reporting templates, which can "branch" to foster data collection, but requires the IGAM module at additional cost.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online, but this requires the IGAM module at additional cost.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, but requires a module at additional cost.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, but this requires a module at additional cost.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports, but this requires a module at additional cost.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs), but this requires a module at additional cost. During implementation, the vendor works with clients to include suggested formats.
- **User Groups**: Lets you configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, and lets you print checks directly from the system through a Checkwriter functionality, or if integrated with an accounting system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with several external accounting packages. Many major packages are supported and the vendor could build integration for other packages at additional cost.

- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, make refunds, place payments on hold, update payment details, and create payments in batch, and track quid pro quo and in-kind payments.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount paid out in a particular year, and not the total amount awarded in a year, but this requires add-on functionality at additional cost.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but requires add-on functionality at additional cost.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but this requires a module at additional cost.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year, but requires add-on functionality at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, but this requires add-on functionality at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires add-on functionality at additional cost.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Lets you automatically create a pending request for a budgeted line item.
- **Program-Related Investments**: There is no defined functionality to support PRIs, but the vendor reports that this could be accommodated by changing the grant amount when the interest repayment is returned, or through custom fields, among other strategies.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is not designed for casual users, but could be performed with training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. You can add new reports using Crystal Reports Writer, or MicroEdge will create new pre-packed reports at additional cost.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you save reports or datasets that you create or modify. You can also export them to Excel, Word, Crystal Reports, HTML, or PDF files.
- **Ad Hoc Reporting**: The data displays throughout the system are flexible enough to support ad hoc reporting. You can define the dataset, data columns, sort order, and formulas to be included on each of these screens. You can export the data into a custom report template that can include logos and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.

- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Lets you search the contents of file attachments, but requires integration with a third-party document management tool, like SharePoint, at additional cost.
- **Standard Reports**: Includes the Foundation Center eReporting Excel format.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation, like charts and graphs, but not maps.
- **Individual Dashboards**: No data available.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions, but only through a separate interface provided by a module at additional cost.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis, but only through a separate interface provided by a module at additional cost.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs, but only through a separate interface provided by a module at additional cost.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user, and allows users to create multiple unique dashboards.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system, but requires a module at additional cost.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members, but only through a separate interface provided by a module at additional cost.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor reports both native file system and database tools external to the system that provide backup and redundancy capability, and that the vendor works to ensure that their clients are following best practices for their use.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system includes unlimited custom fields, and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.

- **Internal Tracking Fields**: Lets you add custom “internal tracking” fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, but requires a module at additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: IGAM supports custom language settings for programs in French, Portuguese, and Spanish.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out, but appears somewhat dated. An extensively modernized new layout is available in GIFTS Alta.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn’t have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: The vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support**: The vendor provides unlimited email support as part of the yearly maintenance fee, and offers a client portal, which includes training articles and video-based training on specific tasks and topics. Monthly online webinars are also offered.
- **Manuals and Documentation**: Documentation is provided via manuals and a CD-ROM, in addition to online resources.
- **Training**: The vendor provides initial training in person at the clients’ site or at MicroEdge’s New York office, at additional cost, and additional training sessions can be scheduled in person or online. Online training courses are offered for the core system and all of its modules. Online training classes offer targeted learning tracks designed to train users how to best work in GIFTS Alta based on their specific role, such as program staff, financial officers, grants management and executives, or other light users. MicroEdge offers a premium services program called, Client Care, which provides bundled services and training at a discount.
- **User Support Forums**: User support forums are available through the PowerME client portal, as well as an annual user conference and virtual and in-person peer group meetings.

Installation and Maintenance

- **Installation and Maintenance**: The system is installed on clients’ computers and servers. Requires Windows server and a database platform, which can be Microsoft SQL Server or SQL Server Express, MS Access, or Oracle.

Vendor Background

- **History**: The vendor has been in business since 1985; GIFTS package has been in use by clients since 1995.
- **Client Base**: The vendor reports that they have about 2,000 clients using this version of GIFTS. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 116
- **Percent of Survey Respondents Who Would Recommend the System**: 74 percent

MICROEDGE GIFTS ONLINE

GIFTS Online is MicroEdge's fully web-accessible, Online hosted entry into the grants management arena. GIFTS Online offers many of the strengths of the installed systems GIFTS and GIFTS Alta, including optional modules, grant information tracking, mail-merging, and application review. As with the new GIFTS Alta interface, the GIFTS Online platform benefits from the considerable work MicroEdge has done to refine the user experience. GIFTS Online can offer customized views per user and per role, including customizable user dashboards. You can also customize your own online forms, which is new since we last saw the system. An entry level client could acquire GIFTS Online for about $5,500 per year. A very large client could pay $42,477 per year.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track the specific percent or dollar allocations for each.
- **Splitting Codes**: It's possible to split grants by custom categorization codes if you configure the system to allow multiple codes per grant.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The system can be implemented with an industry-standard taxonomy. The vendor reports that they are working with industry partners to define a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor, but requires a subscription cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program, but requires a subscription cost.
- **Eligibility Branching**: The system allows for eligibility quizzes which can branch to multiple applications, but requires a subscription cost.

- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but this requires a subscription cost.
- **Support for Multiple Stages**: Supports a three-stage application with an eligibility quiz, Letter of Intent stage, and proposal stage. Grantmakers can also create as many status report stages as they'd like.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required. The data is brought automatically into a staging area in the core system, where it can be reviewed by an administrator and either promoted into the database or declined.
- **Multiple Logins for Grantees**: Supports only one grantee login per grant application, but the original applicant can share the application with anyone they choose via email to view the application, transfer ownership of the application, and make edits to the application or reporting requirements.
- **Transfer of Account and History**: The grantee or applicant can transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Possible duplicates are flagged for the grantmaker to choose whether to create a new account, merge with an existing account, or reject.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the web interface.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages. The system also accommodates video and formatting in HTML and XML.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system performs a virus scan to prevent malicious files from being uploaded onto the application at the point of upload. The vendor also enlists a third party to perform periodic vulnerability tests.
- **Mobile Device Application Access**: While the system does not explicitly support the application process via mobile devices—through responsive design, for example—application forms can be accessed via mobile browsers.
- **Unified Accounts**: Grantees have separate accounts for each grantmaker using the system.
- **Grantee/Foundation Collaboration**: The system can allow foundation staffers and applicants to collaborate and comment on an application before submission, but an applicant would need to transfer ownership to a foundation staffer in order to let the staffer make edits.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. The system includes the ability to do advanced online form design, such as HTML, columns, and vanity URLs.
- **Character and Word Counts**: The system includes word counts for application questions, which can be set and adjusted by a staff user for any field, but does not include character counts.

- **In system Help**: Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Internal reviewers can easily print grant summaries but attachments must be printed out one by one. An additional cost module is required to extend this functionality to external reviewers.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system, but they must open each attachment one by one.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which is customizable by foundation staffers.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, along with tracking reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed. External reviewers can be notified when an application is accepted.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks EINs against IRS Master Business File, flags those not listed as 501(c)(3) nonprofits, and provides updates based on the revocation list. You can perform this check in batch. The system checks for secondary tax status and works for both individuals and organizations, and includes an audit trail with time and date stamp.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists, including the SDN list, within the grants management system itself. The system checks both individuals and organizations and includes an audit trail with time and date stamp.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.

- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures through a basic checkbox. The vendor reports that some clients use third-party solutions to collect and verify electronic signatures.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Tablets can be supported through PDFs.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Only lets you see read receipts for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can set send criteria to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.

- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. Reminder email templates can include merge field information from the requirements.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**:
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, and lets you print checks directly from the system through a Checkwriter functionality, or if integrated with an accounting system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with several external accounting packages. Many major packages are supported and the vendor could build integration for other packages at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in U.S. dollars.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information, but these permissions are configured by the vendor during implementation.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system has the ability to track in-kind and quid pro quo payments tracked separately on the payment record.

Budgeting

- **Budget Tracking Configuration**: Budgeting features are designed to track only the amount paid out in a particular year, and not the total amount awarded in a year, but this requires add-on functionality at additional cost.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but requires add-on functionality at additional cost.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but this requires a module at additional cost.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year, but requires add-on functionality at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, but this requires add-on functionality at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires add-on functionality at additional cost.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system allows users to earmark funds for individual line items for particular applicants, but does not have the ability for budgeted line items to automatically create grant requests.
- **Program-Related Investments**: There is no defined functionality to support PRIs, but the vendor reports that this could be accommodated by changing the grant amount when the interest repayment is returned, as well as through custom fields, among other strategies.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. You can add new reports using Crystal Reports Writer, or MicroEdge will create new pre-packed reports at additional cost.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you save reports or datasets that you create or modify. You can also export them to Excel, Word, Crystal Reports, HTML, or PDF files.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down on dashboards and in report preview screens.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system contains report templates to easily align data with reporting standards used by the sector, including the Foundation Center eReporting Excel format and Reporting Commitment hGrant format.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system. The vendor will consider requests for custom import needs at additional cost.
- **Mobile Device Application Review**: Offers a third-party mobile app, RDP iTAP mobile, to facilitate application review.
- **Grant Information Review from a Mobile Device [**: Offers a third-party mobile app, RDP iTAP mobile, to let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system includes unlimited custom fields, and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so. Customization is considered on an individual basis, and there is the possibility that these customizations will be added to the core code base and made available for all clients. The system allows for personalization of the system done by the end user.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.

- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: The vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support**: The vendor provides unlimited email support as part of the yearly maintenance fee, and offers a client portal, which includes training articles and video-based training on specific tasks and topics. Monthly online webinars are also offered.
- **Manuals and Documentation**: Documentation is provided via manuals and a CD-ROM, in addition to online resources.
- **Training**: The vendor provides initial training in person at the clients' site or at MicroEdge's New York office, at additional cost, and additional training sessions can be scheduled in person or online. Online training courses are offered for the core system and all of its modules. Online training classes offer targeted learning tracks designed to train users how to best work in GIFTS Alta based on their specific role, such as program staff, financial officers, grants management and executives, or other light users. MicroEdge offers a premium services program called, Client Care, which provides bundled services and training at a discount.
- **User Support Forums**: User support forums are available through the PowerME client portal, as well as an annual user conference and virtual and in-person peer group meetings.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1985; GIFTS Online has been in use since 2009.
- **Client Base**: The vendor reports that they have about 300 organizations currently using GIFTS Online. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 40
- **Percent of Survey Respondents Who Would Recommend the System**: 87 percent

NPOWER FOUNDATIONCONNECT

FoundationConnect is an Online hosted solution built on top of the Salesforce platform. The vendor, NPower, is a grantseeking nonprofit. The system capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers and management to see only the information relevant to them. Grantees and external reviewers log in through a separate, but tightly integrated, portal application. Users will want to visit the Salesforce AppExchange to add Conga Composer or LOOP Document Services for mail-merge and template capability. Email sent from FoundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but is limited to 500 emails per day. Many broadcast email programs, like Vertical Response and Team Approach, also integrate tightly with Salesforce. A free connector lets users log email sent from Outlook and synchronizes their Outlook contacts with the system. The initial license cost for FoundationConnect ranges from $25,000 for small foundations to $40,000 for larger foundations, with maintenance and support ranging from $7,200 to $14,400 and up per year. The Salesforce license is free for nonprofits for up to 10 user licenses, and costs $360 per license per year on top of that.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations if you adjust these in the payment schedule.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: No data available.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by entering it as a new application.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links. The system can also be customized to store attachments as links. The system has added the ability to index and version attachments.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The vendor is working with partners including the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but only by clicking a link or by spitting the application into multiple tabs. The system does not currently support branching based on values entered in a field.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: No data available.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved, but immediately prior to session timeout rather than at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Unified Accounts**: The system does not support the ability for applicants or grantees to manage all grant information for all funders in the system using a single logon.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete, on a field-by-field basis.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. You can also fully match the style sheet of your foundation's website, and collect custom objects in Salesforce and link to them.
- **Character and Word Counts**: The system includes character, but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system hover-text help editable by the foundation staff, as well as instructional text within the application forms.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: External and internal reviewers can easily print grant summaries and attachments with the configuration of add-on components such as Conga Composer, LOOP Document Services, or another Salesforce app at additional cost. You can sort and filter by program and date.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily. Reviewers can upload attachments.
- **Viewing Documents in the System**: Reviewers must manually open documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. The system uses the Salesforce workflow functionality.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different and customizable information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. Lets you track reviewers and applications by geography or other criteria defined by grantmaker for making assignments. You can't save review panels in the system, but you can batch assign reviewers to requests.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either by alert within the system or via email based on configuration.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against the current version of the IRS Master Business File and Publication 78 Database, and flags those not listed. The tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC , SDN, and other terrorist watch lists within the grants management system itself. The OFAC check includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that includes mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. But some more complicated merges require Conga Composer, LOOP Document Services, or another Salesforce app at additional cost.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board dockets, but requires Conga Composer, LOOP Document Services, or another Salesforce app at additional cost.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process, but requires an external app for the Salesforce process.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Sophisticated templates may require Conga Composer, LOOP Document Services, or another Salesforce app at additional cost.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. You can send up to 500 emails per day within the system. Higher volumes can be supported via add-on modules such as VerticalResponse or Team Approach, possibly at additional cost.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, but you must set up the template beforehand rather than inserting merge fields into an ad hoc email message. You can't edit emails on an individual basis after they have been merged.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports, but requires a module at no additional cost for up to 10,000 emails per month. Additional fees apply after the monthly limit is reached. Higher volumes can be supported via add-on modules such as VerticalResponse or Team Approach, possibly at additional cost.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as well as schedule email reminders based on a variety of other criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam. Salesforce caps outbound at 500 emails per day. Higher volumes can be supported via add-on modules that integrate tightly with Salesforce, such as Vertical Response, iContact, and MailChimp, possibly at additional cost.
- **Spell Checking**: Lets you spell-check emails within the system.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of individuals no longer associated with a grant by keeping them as former contacts, and they will not show up as active contacts for communication.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.

- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through contact roles.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization. Call and email logs are available throughout the system, not just on contact records.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook. Requires an Outlook connector at no additional cost.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, but cannot set up a default set of requirements that applies to all grants.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines, and pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The system includes some basic standard formats.
- **User Groups**: Lets you track evaluation metrics by collecting uniform evaulation data across program as well as individual grant-specific evaluation criteria.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule, including multiple payments, for each individual grant, but does not easily allow you to create a default payment schedule for all grants.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. It's not possible to print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports the tracking of information about ACH payments and wire transfers, but to process payments, you would need to integrate the system with your accounting system or a payment gateway.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number, either by integrating with your accounting system or through manual entry.
- **Accounting Integration**: The vendor has integrated multiple accounting systems, at additional cost, by leveraging a Salesforce API that provides easy linkage to financial systems.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information, but requires some system configuration at no additional cost.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency, but requires some system configuration at no additional cost.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments and place payments on hold by creating statuses with workflows associated with them. There's no default ability to track quid pro quo and in-kind payments, although this could be tracked in custom fields. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded. The system has new features for budget tracking that can automate some of this work.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending). The system has new features for budget tracking that can automate some of this work.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Lets you set up "what-if" scenarios by "cloning" a request. The cloned request's status changes to "projected" and from here you can see budget projections.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to payments.
- **Program-Related Investments**: The vendor has customized the system to track interest repayment on PRIs for several clients.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, and queries without navigating a much-larger set.

- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments.
- **Standard Reports**: Includes guide for producing reports that easily align data with reporting standards used by the sector and includes substantial ability to pull in data feeds from external sources through the comparative grants API.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard, and users can monitor indicators personalized to them.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log. Any field can be configured to be tracked and audited.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Mobile Device Application Review**: Provides an interface specifically designed to see, code, approve, and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device [**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity**: All data is hosted by Salesforce.com, which provides robust, multi-layered protections to ensure data confidentiality and integrity (more detail available here: http://trust.salesforce.com/trust/security/).

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.

- **Custom Fields**: Lets you create unlimited custom fields within the system which have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, potentially at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides phone and web-based support from 9 a.m. to 6 p.m. EST as part of standard support and maintenance. Additionally, Salesforce provides 24/7 support that can be helpful in some cases.
- **Online Support**: The vendor includes a suite of online support tools via The FoundationConnect Customer Portal, including a Chatter-based user forum, articles, a wiki with legacy documentation, Q&A, Cases, and Ideas for product suggestions.
- **Manuals and Documentation**: The system provides significant documentation through its customer portal, described above.
- **Training**: The vendor provides initial training online as part of implementation services. On-site training is available at additional cost.
- **User Support Forums**: The vendor provides The FoundationConnect Customer Portal for user support forums.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: NPower NY was founded in 2000 and has been providing database solutions to the nonprofit sector since 2005. The Foundation Grant Manager product was formally launched in June 2009.
- **Client Base**: The vendor reports 63 clients. Approximate breakdown is 75 percent private foundations, 10 percent family foundations, 10 percent community foundations, and 5 percent government and other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 30
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

PHILANTECH PHILANTRACK

PhilanTrack is an Online hosted option that prioritizes the user experience for both grantseekers and grantmakers. It provides solid support for tracking applications and grants, and for producing letters and board dockets. The online application interface allows grantseekers to use the system as their own grant language repository, with the ability to search for and reuse language they've used on past grants. Grantmakers will find PhilanTrack simple to navigate, though at the time of this review search functionality is tied to specific areas of the system, meaning you have to know the tab in which the subject of your search is located in order to find it. PhilanTrack's relationship-management facility is somewhat limited, with only basic support for tracking communications with grantees—you can keep a call log on a grantee record, but emails generated within the system must be added manually. And while the system can generate automatic emails based on a number of action-triggers, there's no way to easily define parent/child relationships for organizations in the system. PhilanTrack's pricing starts at $4,000 annually with another $4,000 in first-year setup costs.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Codes**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle. Search functionality is currently spread across multiple areas and you have to know where data lives in order to search for it. For example, if a field's home is in the grants tab, you couldn't search for it from another tab.
- **Handling Paper Applications**: An application received in paper can be entered into the system, but you must log in as a grantee to do so. The system also allows you to scan and upload paper applications for attachment to the applicant's record.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields as long as they are associated with a grant.
- **Taxonomy**: The system supports the industry-standard taxonomy defined by the Foundation Center.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The vendor can configure the system at implementation to allow both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Grantmakers can construct application forms by choosing questions from a large existing set and adding them to the application in any order they wish. This interface is easy to use. The vendor typically works

with the grantmaker to add any funder-specific questions in the initial implementation phase, and will continue to add additional questions to the pool over time on request, without charge.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: The vendor can configure eligibility quizzes to branch to multiple applications based on the applicant's responses.
- **Application Branching**: Branch logic can be used in eligibility quizzes, but not in LOIs, proposals, and status reports. Eligibility quizzes can direct certain applicants to an entirely different LOI or proposal form based on their quiz responses, however.
- **Support for Multiple Stages**: Supports a three-stage application with an eligibility quiz, Letter of Intent stage, and proposal stage. Grantmakers can also create as many status report stages as they'd like. A proposal can only automatically pull the title of the grant, amount requested, and applicant contact information from the Letter of Intent.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections. Each user can also be assigned a different level of permissions so that some users can enter information while others can finalize and submit the proposal.
- **Transfer of Account and History**: A grantee has the ability to designate a new contact person for a proposal or grant.
- **Reuse of Application Data**: Applicants can easily see submitted applications and their whole history with a given grantmaker. They cannot copy an entire existing application to use as a template for a new one, but the system is built specifically to make it easy to reuse answers to previous questions—applicants use a "find similar questions" feature to easily copy and edit past answers from any application they've filled out using the system.
- **Duplicate Accounts**: The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Admin users and the vendor also have the ability to review applicants for duplicates, and merge accounts.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: When an application is submitted, the designated contact for the application is emailed a confirmation. The vendor frequently customizes this email for free as part of the setup process, but grantmakers need to go through the vendor for any additional changes.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, but applications cannot contain multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but the system warns applicants at regular intervals if they do not save manually.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system scans files for viruses at upload.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: Applicants or grantees can manage their grant information for all funders using the system through a single account.

- **Grantee/Foundation Collaboration**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: The eligibility quiz, but not other online forms, can be customized to match the look and feel of your website.
- **Character and Word Counts**: The system does not include any functional character or word counts for application questions. Users can define a suggested character limit, but this is not enforced by the system.
- **In system Help**: The system provides a standard FAQ list for applicants, as well as a help desk and support ticketing system. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Does not support checklist functionality to define what information or documents you require from prospective grantees. The system, however, allows you to select which questions require a response.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Does not let you define automatic steps and rules for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes can be customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest.
- **Comment Sharing Among Reviewers**: Does not allow reviewers to see each other's comments and grades, unless they have also been granted another role, like board member, which allows them to view other parts of the system.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email or in-system notifications when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: For online applicants, Employee Identification Numbers are checked against the IRS database during the eligibility quiz. Otherwise, they can be checked by the grantor when entering a new organziation. 501(c)(3) status is visible when viewing organization information.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you choose from different board docket reports that either print grant summaries or the entire application, with the foundation's logo. Board dockets can be produced in Word format, which allows you to customize fonts and colors.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you download a series of summaries to PDF or Word-compatible files, which then can be printed.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not support third-party electronic signature services, like DocuSign.
- **Printed and Electronic Templates**: The system includes templates for print, email, and PDF formats.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual, but not to a group of people at once.
- **Email Template Flexibility**: Lets you create email to individuals based on templates that include both standard text and "mail-merge" type inserted data, but only the vendor can create and modify email templates. This is typically done at no additional cost. Emails can be edited prior to sending if sent through the client's default email client.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees based on the number of days prior to the due date.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not include spell-checking functionality for email.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on forms. The system will preserve an individual's history with a grant even after they have left the organization. The organization, but not the grantmaker, can mark a contact as inactive. Inactive contacts are excluded from system generated communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization except as fiscal sponsors.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization.
- **Record of Correspondence**: Does not store any record of system-generated emails or letters.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.

- **Email Capture**: Does not let you automatically capture emails from an external email system. Emails can be manually added to the grantee record.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, but cannot set up any default set of requirements that applies to all grants.
- **Branching for Evaluation**: Lets you set up requirements by proposal template, but not "branch" data collection depending on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. The vendor can configure email templates to include merge fields.
- **Progress Report Tracking**: Currently, can track that a progress report has been received, but not whether staff has approved it.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor can provide suggested formats for progress reports.
- **User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Allows you to export a filtered set of grant records that can be used to generate paper check requests outside of the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years, on a per-grant basis.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but can export payment information to a csv file that can be imported into an accounting package. The vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in a single currency.

- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but the system only flags contigencies rather than enforcing them.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Voided and refunded payments can only be tracked through notes. In-kind or quid pro quo grants can only be tracked as a separate, custom grant type.

Budgeting

- **Budget Tracking Configuration**: The budgeting features can track both the amount paid out in a particular year and the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program or grantee and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined program areas.
- **Budget Basing**: Does not let you base current year's budget on the previous year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting on a per-grant basis.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: There is no ability for budgeted line items to automatically create grant requests.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. The system has strong support for ad hoc reporting, however.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers. The system also supports ad hoc reporting from nearly any field displayed to users by exporting data to Excel for formatting.
- **Grant Summary Tracking**: You can define codes and see them in reports, but these codes cannot be rolled up hierarchically—for example, to show grant money paid to each Education sub-program as well as total Education grants, except by exporting the report to Excel and analyzing it there.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not currently let you search within attached documents.
- **Standard Reports**: The system contains report templates to easily align data with reporting standards used by the sector, such as the Foundation Center eReporting Excel format.
- **Automating Reports**: Reports cannot be set to run and send automatically.

- **Visual Reports**: The system provides the ability to create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: The system does not provide "dashboard" views that summarize the grants currently relevant to each individual user, or let users create multiple unique dashboards. The vendor reports that standard reports can serve the need for visually displayed information.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no ability to customize these roles or what permissions they have.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a board-specific interface and grant access through permissions.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log, but the log is only accessible by the vendor.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are available. However, you can run standard reports, which provide both visual displays and additional information similar to that which a dashboard would provide.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system, but at the time of this review the tasks are manually entered by the user rather than system-defined.
- **Task Assignment**: Does not currently let you assign tasks to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv. The vendor notes the system can also export to .pdf and .rtf formats.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system. Use of API can require communication with vendor, which may involve additional fees.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Users cannot create custom fields. Some existing field names can be customized but not all.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs, possibly at additional cost.
- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define different languages for application forms and progress reports.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides phone support for 30 days and email support thereafter. There is a support upgrade with phone support past the initial 30 days.
- **Online Support**: Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation**: The vendor provides online manuals and help documentation, including training videos and a troubleshooting guide as part of an online knowledgebase.
- **Training**: The vendor provides two hours of web-based initial training, and a one-hour training for administrators. The vendor allows access to a "sandbox" version of the system to customers during implementation.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2004. Philantrack has been in use by clients since 2007.
- **Client Base**: The vendor reports that they have about 40 clients. Breakdown by foundation type is 60 percent private, 10 percent corporate, and 30 percent community foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 7
- **Percent of Survey Respondents Who Would Recommend the System**: 83 percent [Note: Five out of the six people who answered this question said Yes. One person skipped the question.]

POWEROFFICE

PowerOFFICE is a solid, well-rounded system with particularly strong features around relationship and contact management. Built on IBM Notes Domino, the system can be installed on your organization's server, or hosted on the vendor's servers. PowerOFFICE is fairly strong in both print and email communication, although delivery statistics for broadcast email are only available through customization by the vendor. The system provides relationship and contact management through the PowerPEOPLE module, which allows users to track all the communication they've had with individuals and associate multiple contacts to organizations and grants. The online application process is straightforward—the vendor will create application forms for you, but applicants cannot save incomplete applications to finish later before submitting, and neither can they view or print submitted applications without customization. A small foundation that receives only 10 applications annually could expect to pay about $3,000 per year for a hosted version of the system, plus a one-time setup fee for online applications starting at around $4,000, or a one-time cost of $6,000 to install the system on your own server, plus annual fees of $1,600 and the setup fee for online applications. For larger foundations which receive around 100 applications annually, the system would be $6,600 per year hosted (plus setup fee) or $12,000 for installed (with an annual fee of $2,000).

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Codes**: Lets you split grants across some, but not all, different codes or categories.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by creating a new request from the admin view and filling out fields.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the vendor can configure the system, possibly for a fee.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online with, at a minimum, file uploads, drop-down boxes, checkboxes, and text fields, but the vendor must set up application forms for you at additional cost.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: The system supports multiple application stages, including new proposal, pending review, waiting for additional criteria, approved, withdrawn, and declined. Users cannot customize these statuses but can create "sub-statuses" for each.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees without customization by the vendor, possibly at additional cost.
- **Transfer of Account and History**: There is no ability for applicants to transfer their account and grant history to a new staff contact without contacting the grantmaker.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Duplicate Accounts**: The system does not automatically check new registrants to make sure that they don't already exist in the system, but the user has the ability to manually consolidate applicant records based on mailing address.
- **Viewing Status Online**: Applicants cannot view their status online without customization, possibly at additional cost.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Applications are configured by the vendor.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants must complete applications in one session.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: The vendor can create a registration process for applicants at implementation, for additional cost.
- **Lost Credentials**: Lost credentials can easily be reset by the grantmaker, but not by applicants.
- **Viewing Applications**: Applicants cannot view or print applications without customization by the vendor, possibly at additional cost.
- **Preview Packet**: Applicants cannot view or print applications without customization by the vendor, possibly at additional cost.
- **Security Scan**: The system itself does not scan files for viruses at upload. Clients have the ability to restrict what file types can be uploaded by applicants.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web broswer.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: The system allows reviewers and applicants to work back and forth on a proposal through email only.

Form Design and Flexibility

- **Look and Feel**: Applications are configured by the vendor.
- **Character and Word Counts**: The system does not include character or word counts for application questions, but the vendor could customize this, possibly at additional cost.
- **In system Help**: Clients have the ability to customize the text around an application form to provide additional instructional text. The client provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can print grant summaries or full grant information, if granted access to that functionality by the client.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest unless configured by the vendor at implementation, possibly at additional cost.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: You cannot report on numeric review scores as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, without customization.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, without customization.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view but not customize letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system typically uses individual user IDs for authorization, but can support third-party electronic signature services.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. Emails can be edited after merging the list.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics without customization by the vendor, possibly at additional cost.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system.

Relationship Management

- **Tracking Individual History**: The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization without customization by the vendor, possibly at additional cost.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you automatically capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant, by creating specific task forms or subgroups for each grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online without customization by the vendor, possibly at additional cost.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track that a progress report has been received, but not whether staff has approved it, without customization by the vendor, possibly at additional cost.
- **Storing Progress Report Data**: You cannot store progress report information submitted by grantees in multiple data fields (i.e., you can only store progress reports as attached documents).
- **Online Progress Report Submission**: No data available.

- **Creating Online Progress Report Forms**: Does not let you create online progress report forms without customization.
- **User Groups**: The system has the ability to configure task lists to collect data based on grant program.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due, and whether the grantee has met the associated prerequisite requirements, on an individual grantee basis.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement through notes.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests, organizations, and contacts to an accounting system.
- **Other Payment Issues**: The system provides the ability to void or place holds on payments in the system, update payment details in batch, and track in-kind and quid pro quo payments. Users cannot refund payments in the system or create payments in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Lets you set up "what-if" scenarios.

- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, searches, and notes without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save SQL searches, but not reports, that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel or a separate reporting tool for formatting.
- **Grant Summary Tracking**: Cannot track or report summaries based on any codes—for example, to show grant money paid for a set of geographical regions—without exporting the list to Excel.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments.
- **Standard Reports**: The system contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Reports are dynamically generated, and can be set to automatically run and send the results to reviewers or users.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: The system does not provide "dashboard" views to summarize the grants currently relevant to each individual user.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Fields and modules can be hidden from users based on role, but the system does not provide a simpler interface for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: The system does not provide "dashboard" views to summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for board evaluators, but not for management.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles without customization by the vendor, possibly at additional cost.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system, unless they purchase the source code.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Users cannot add custom fields, unless they have purchased the source code. The vendor can add fields for the user upon request, possibly at additional cost.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets for applicants and reviewers based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking but fields are sometimes crowded together, making it more difficult to scan.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides phone support at additional cost.
- **Online Support**: Vendor provides email support at additional cost.
- **Manuals and Documentation**: The vendor provides manuals and documentation online.
- **Training**: The vendor provides training in person or via the internet at additional cost.
- **User Support Forums**: User support forums or discussion groups are not available.

Installation and Maintenance

- **Installation and Maintenance**: The system is available installed or hosted on the vendor's servers. This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business for 25 years; the system has been in use by clients for 15 years.
- **Client Base**: The vendor did not disclose the number of clients. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 0
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

SMARTSIMPLE GMS360°

SmartSimple's GMS360° has undergone a major user experience redesign which complements its power and flexibility with greater ease of use. This system lets you create relatively complex online forms that can contain a wide variety of field types, including rich text fields with formatting toolbars and internal tracking fields that can be made invisible to applicants. Uploaded files can be version-controlled and indexed, making their contents available to queries and reports. The system provides useful support for managing relationships, broadcast email, mail-merged letters, and reporting, as well as integrated task lists and dashboards to manage each user's work. Payment functionality and budgeting are particularly strong, with support for payment workflows and multiple currencies. SmartSimple implementation starts at about $20,000. Annual support and maintenance are included in monthly user fees."High usage" staffers such as grants administrators and program officers who use the system more than 40 hours a month, are billed at $1,176 per user per year (billed on a montly basis). "Low usage" staffers who are logged into the system for less than 40 hours per month are billed at $180 per year (again on a monthly basis). External users, like reviewers or board members, are billed annually at $2,400 total (on a monthly basis). License fees are based on actual usage, and the system automatically audits the user type for fair billing.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocation if the categories are tied to the budget.
- **Splitting Codes**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, organizational records, and personal profiles, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle. The vendor has added considerable enhancements around searching.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system from the new applications area of the Submission Manager module. Forms can be filled in PDF and the data imported back into the system.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: The system has support for the NTEE syntax within the system, and the vendor is willing to work with clients to incorporate other taxonomies into the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individuals and organizations to apply for grants from the same grant program.

- **Creating Online Applications**: Lets you create an unlimited amount of online applications with file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create unlimited different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed. The system also supports branching at the point of registration.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The vendor reports that grantees or applicants can transfer their account and history to new staff contact if a foundation's business rules allow for this.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: There is a process for grantmakers to review applicants to look for duplicates on the back end.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications and all attachments.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals. The auto-save interval is configurable.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. Clients can opt for manual approval of registration requests or to allow applicants with accounts to create their own additional accounts for their organization.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.
- **Mobile Device Application Access**: The system does not explicitly support application process via mobile or tablet, although the administrative interface is fully functional on a mobile or tablet device.
- **Unified Accounts**: The vendor reports that the platform allows for applicants or grantees to manage all grant information for all of their funders in the system.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete. For instance, a reviewer could add a note visible to the applicant, and configure a trigger to alert the applicant of the note's existence.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. You can also fully match the style sheet of your foundation's website.

- **Character and Word Counts**: The system includes character and word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the foundation staff.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, the communications history and what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information as a PDF. Audio and video attachments can be viewed within the system.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Lets reviewers easily view selected documents associated with the request and stored in the system. Audio and video files are playable within the browser, and documents are converted to a single PDF.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process and configure a workflow without the assistance of the vendor. Workflows can branch based on various factors, such as request amount.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments. Reviewer comments can be made visible to the foundation staff as soon as they are saved as a draft.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. You can also create and save review panels to assign to requests.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either via email or internal message, or both.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system uses the IRS database and also supports similar lists from the Canadian Revenue Agency and Inland Revenue of the UK. Provides updates based on the revocation list. The tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC , SDN, and other terrorist watch lists within the grants management system itself. The OFAC check is supplied by OFAC Analyzer and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket, and includes a dedicated interface to manage board meetings and the creation of documents to support them.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process.
- **Printed and Electronic Templates**: Includes templates for print and electronic formats. Tablets can be supported through PDFs.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent as blind copies, but rather individually to minimize the likelihood of being caught in a spam filter.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. You cannot edit one-off emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission. Email configuration is done through the workflow engine.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule emails based on date or elapsed time. Email configuration is done through the workflow engine.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam. Alternatively, email can be sent through the client's email servers or through third-party email services, which may require an additional fee.
- **Spell Checking**: Lets you spell-check emails within the system.

Relationship Management

- **Tracking Individual History**: The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.

- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees. A grant can be associated with any number of pre- and post-activities.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines, and pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**:
- **User Groups**: The system can support user groups to collect uniform data for evaluation purposes through a variety of means, including manual grouping of organizations, cross tab views, and ad hoc reporting.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but it's not possible to print a check directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with Quickbooks, Accpac, and SAP. The vendor states they can also faciliate data transfer to most other GL systems.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.

- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: There's no built-in way to add a note to payments, although one could be added through custom fields.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments and place payments on hold as statuses within the system. There's no default ability to track quid pro quo and in-kind payments, although this could be tracked in custom fields. There's no ability to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch, or ability to create payments in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount and disbursements for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes. You can also manage multiple budgets and draw funds on a per grant basis.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios, although the vendor reports that this feature is forthcoming.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to disbursements.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently. There is also a more advanced reporting sub-system for expert users.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers, but some formatting requires HTML/style-sheet expertise. The system also supports ad hoc reporting from nearly any field displayed to users by exporting data to Excel for formatting.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.

- **Attachment Searching**: Lets you search the contents of file attachments.
- **Standard Reports**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard, and users can monitor indicators personalized to them.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the system—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members that can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system. Webservices, AJAX, and .Net APIs are provided.
- **Mobile Device Application Review**: Provides a standalone app for Android devices that allows for application review. Most tablets also have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Provides a standalone app for Android devices which allows you to see grant summary and grant details from a mobile or tablet device. Most tablets also have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor reports that the system protects the integrity and security of data within the system through best practice sever encryption, configurable password policies, role based access, optional two factor authentication, and intruder lockouts, among other practices.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes, as well as change field types.
- **Custom Fields**: The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields, and you can track the creation or change of custom fields in a log for historical documentation.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.

- **System Extendibility**: Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it. The User Interface is configured to meet the specific needs of the client.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take. The User Interface is configured to meet the specific needs of the client.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support at no additional cost. The vendor can provide tech support for applicants as well, but at additional cost.
- **Online Support**: Vendor provides a wiki at smartsimple.org that houses documentation for SmartSimple. There are also support videos on YouTube.
- **Manuals and Documentation**: Documentation is created by the vendor to facilitate the training of new hires.
- **Training**: User training at the SmartSimple facility is included with every system or via WebEx Sessions. On-site training is available on a fee basis. Additional training is also provided. SmartSimple offers training for end users and system administrators.
- **User Support Forums**: Vendor provides an online community portal and the SmartSimple LinkedIn group provides forum for discussions.

Installation and Maintenance

- **Installation and Maintenance**: There are three hosting options: 1) Multitenant: Vendor hosts multiple clients in one server; 2) Dedicated server: Vendor hosts SmartSimple for client on a separate server; and 3) Self-hosted. The client hosts SmartSimple on their own server, which can be either Windows, Amazon, or Linux-based.

Vendor Background

- **History**: The vendor has been in business since 2002. SmartSimple Grants Management has been in use since 2004.
- **Client Base**: The vendor reports that they have about 40 clients for SmartSimple GrantsManagement. The breakdown by type of grantmaker is 10 percent private foundations, 10 percent corporate foundations, and 52 percent government. The remainder are other entities, including community foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it. The company is managed by the founding ownership team. There is no debt financing and no outside investments.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 24
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

VERSAIC GRANTS

The Versaic platform is used by a number of corporate philanthropic departments to manage grantmaking, product donations, and sponsorships. Versaic Grants is a highly flexible platform built on Microsoft's .NET business application framework. The vendor provides consulting services for clients, including configuration of online forms, batch updates, and ongoing tech support for applicants and grantees. Reporting is very strong in the system, and it has powerful internal workflows that can help segment applications based on programs and automatically rout them to the right staffers. There's no OFAC checking in the system at this point, and you can't see email delivery statistics. The Versaic Grants solution can be implemented for $10,000 and up, with subscription fees of $10,000 and up per year for small foundations. For larger foundations, the vendor quoted a minimum implementation cost of $20,000, with annual subscription fees starting at $15,000.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Cycles are not a pre-set system feature; this would be accommodated through configuration.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track by specific percent or dollar allocations.
- **Splitting Codes**: Lets you split grants across program codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be entered into the system either by duplicating an existing application or creating a new application and entering the information.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Batch updates are possible but must be handled by the vendor.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the vendor would be willing to build one upon request.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online, but the vendor must set up application forms for you—there's no additional cost for most typical applications.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.

- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations. Applications can then be sent to different mailboxes for routing to the proper staffer on the back end.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees and applicants cannot transfer account and history to a new staff contact, but could contact the vendor or grantmaker to make that transfer.
- **Reuse of Application Data**: It's possible to carry over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal. However, the vendor generally recommends against duplicating proposals.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Applications are configured by the vendor.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. There's a registration check for security and to confirm the email address.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials—this process is highly configurable.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system performs an anti-virus scan on all documents uploaded into the system.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the administrative interface is fully functional on a mobile or tablet device.
- **Unified Accounts**: There's no current means for applicants or grantees to manage all grant information for all of their funders in the system, but the architecture of the software could support this, and the vendor reports that this is on the product roadmap.
- **Grantee/Foundation Collaboration**: The system does not currently have the ability to let applicants and reviewers work together on a proposal in draft form, but reviewers can return submitted applications to applicants, with comments, multiple times for more information or edits.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Vendor provides ongoing configuration as part of the annual fee.

- **Character and Word Counts**: The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In system Help**: The system includes in-system help editable by the vendor. Grantees and applicants can contact the vendor directly for technical assistance.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: External or internal reviewers can easily print grant summaries, but not attachments—those would need to be printed manually.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can view selected documents associated with the request and stored in the system, but they need to manually open them apart from the application.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process and throughout the system on a very sophisticated level.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. This must be customized by the vendor.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: The system would need to be customized in order to track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, as well as to track reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, including by only a portion of the assigned reviewers if that is a desired workflow. The system can send notification within the system and via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. Vendor is implementing GuideStar Charity Check. Provides updates based on the revocation list. The tax status automatic check includes auto-population of related fields for legal name, EIN, and tax status. It does not include date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). The vendor can perform checks and updates in batch.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, but the vendor is implementing GuideStar Charity Check, which will include this service.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. You can also create mailing labels.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and which are time stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Printed and Electronic Templates**: The system includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Emails are sent individually from a no-reply address to avoid spam filters.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and edit the emails after they have been merged. You can add logos and other graphic elements through HTML.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails can be sent through third-party email services or through clients' email servers, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: There's currently no internal spell-check for email, but the vendor reports that this could be configured.

Relationship Management

- **Tracking Individual History**: The system could be configured to let you keep a record of an individual no longer associated with a grant within the system's audit trail, and have the individual not show up as an active contact for communication.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization, although this could be customized.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant, but it's stored in the entire audit trail with all the rest of the information about the grant.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log.

- **Email Capture**: Does not currently let you capture emails from an external email system, although this could be customized.
- **Contact Synchronization**: Does not currently synchronize contacts with Outlook, although this could be customized.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" to different progress report forms based on type of grant program.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, including numerical evaluation results.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Online progress report forms (for example, corresponding to different programs) can only be created by the vendor, but this is covered in the ongoing annual fee. The vendor reports that they are planning to release default reports that will be available to all clients in the future.
- **User Groups**: Supports program-based user groups in order to collect uniform data consistent with other groups.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants. The vendor could adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers, but you need to manually enter information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check number/ACH payment/wire transfer number (the latter must be manually entered).
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages. Most of their clients do not choose to integrate their accounting systems, however.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.

- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Lets you void payments, refund payments, and place payments on hold through statuses with workflows associated with them. Lets you track quid pro quo and in-kind payments, through configuration. It's not possible to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch, although the vendor could do so.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined groups, categories, or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **What-Ifs**: The vendor has built in forecasting tools that could support "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items are connected to grant requests.
- **Program-Related Investments**: There's no current support for interest repayments on PRIs, but the vendor is willing to configure this for clients if needed.

System Querying and Reporting

- **General Reporting Approach**: The system uses Microsoft reporting technology as its infrastructure. The vendor helps configure and customize complex reports for foundations.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs, but the vendor must upload the new versions for you.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, queries, and actions without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format or Reporting Commitment hGrant format.
- **Automating Reports**: Vendor would need to configure the system to have reports automatically run and send to individuals and groups.

- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **Individual Dashboards**: The system provides some basic dashboard views that summarize the information currently relevant to each individual user. The vendor creates them for you. The system lets users have their own multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on either a functional or a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members through system customization.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv
- **Custom Data Feeds**: The vendor can provide custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices, but interface is fully mobile and tablet responsive.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device, but the interface is fully mobile and tablet responsive.
- **Data Integrity**: The system protects sensitive data and any data that a customer requests be encrypted through Microsoft SQL server protocols. All sensitive data transferred over the internet is encrypted using 40-bit to 128-bit SSL 2.0 encryption, depending on browser settings. Versaic's hosting provider is both SAS 70 Type II and SSAE 16 certified.

Overall Customization

- **Dropdown Fields**: The vendor would customize dropdown values for fields.
- **Custom Fields**: The vendor can create custom fields and provide an audit log.
- **Internal Tracking Fields**: The vendor would customize internal tracking fields for staff use.
- **Online Information Customization**: The vendor would customize online application and review forms.
- **Vendor Customization**: Vendor will extensively customize system to your needs.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out. The vendor customizes the interface based on each implementation.

- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: The vendor provides unlimited phone support for every user.
- **Online Support**: The vendor provides unlimited email and web meeting support for every user.
- **Manuals and Documentation**: Manuals and documentation are provided for each client on an as-needed basis.
- **Training**: The vendor provides all initial and ongoing training for every user. All system configuration changes are included as part of the subscription, and the vendor also provides consulting services to ensure all changes meet client requirements.
- **User Support Forums**: There are no user support forums at this time.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2000; Versaic Grants has been in use by clients since 2010.
- **Client Base**: The vendor reports 90 clients, all of which are corporate.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 0
- **Percent of Survey Respondents Who Would Recommend the System**: n/a

WESTAF'S GRANTSONLINE™

Designed as the successor to CultureGrants Online™, WESTAF's GrantsOnline™ (GO for short) was built by grant-makers for use by the sector. In addition to traditional grants management functionality, GrantsOnline™ has some unusual features likely to be of interest to arts funders, such as the ability for applicants to submit videos in support of their applications. Conveniently, the videos stream rather than download, although files are converted to the Flash format, which isn't well supported on iOS devices like iPads. While generally strong in internal tracking, the system has a comparatively limited ability to track grants easily by categories and codes. Dynamic fields allow you to build powerful online forms with more intricate branching logic than you'll find in most other systems. Application review and email capabilities are similarly strong. During implementation, clients can select from a menu of options for grant-payment functionality that can be included—possibly, for an additional implementation cost. While reporting facilities are powerful and flexible, there's no ability to see a list of favorite reports. Pricing for GrantsOnline™ has three tiers and starts at $4,450 in annual license fees for five grant programs and up to 500 users with a first-year setup fee of $7,550. Media storage per user above 100MB is available at additional cost.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not specific percent or dollar allocations without customization.
- **Splitting Codes**: It's not possible to split grants across program codes without customization.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you attach files to grant records, including Word documents, Excel spreadsheets, and PDFs, as well as audio or video files.
- **Searching**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system as a new grant.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates**: Does not easily let you perform batch updates of defined coding and other fields.
- **Taxonomy**: The vendor is developing support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: There is limited availablility to see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the username of each new registrant to make sure it doesn't already exist in the system, and duplicates can also be identified on the back end.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can spell-check applications if their browser is configured to do so.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress.
- **User Registration**: Applicants enter email address and password, but are not sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes a listing of uploaded documents with links to view or download them.
- **Security Scan**: All documents and images are scanned for viruses before uploading to the system. Audio and video samples are converted to Flash upon upload.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet.
- **Unified Accounts**: There's no means for applicants or grantees to manage all grant information for all funders in the system from a unified account.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a grantmaking staffer to comment or make suggestions, and work back and forth until a proposal is complete.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation with a simple WYSIWIG editor. For more advanced form design, the system supports CSS.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In system Help**: Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms. The vendor asks the foundation to be the "first line of defense" for applicant inquiries, but can take on technical inquiries as needed.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Lets external reviewers print out full grant application information by converting applications and support materials into a PDF file, but not summaries of grants.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can view selected documents associated with the request and stored in the system, but it requires some clicks to navigate there from the reviewer portal home page.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which is customizable by foundation staffers. You can also choose to assign more weight to certain scores over others.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. The system doesn't support the tracking of reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. Aggregation is available only through reporting.
- **Review Status Notification**: It's not possible for the proposal owner, external reviewers, or grants management staff to be automatically notified when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system has limited ability to support electronic signatures through a custom text box, but cannot provide independent secure verification.

- **Printed and Electronic Templates**: There are no default templates for electronic or tablet view, but the system supports the creation of sophisticated PDFs for board meetings.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent via blind copy.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. You can preview emails after merging them, but cannot edit one-offs.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups, but these attachments are limited to PDF files generated by the system.
- **Email Delivery Reporting**: Lets you see read receipts and notifications of non delivery, but not open, click-through, or unsubscribe rates for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as well as if an application's status changes.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization. This log can be threaded and is searchable.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook. Contacts can be exported to a file that can be imported into an external email system.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you set up conditional logic for progress reports, but not "branch" data collection depending on type of grant.

- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, and lets you merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The system does not include suggested formats, but the vendor works with clients during implementation to configure forms according to best practice.
- **User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups through its report builder.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. This requires configuration at no additional cost. It's not possible to print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years. This requires customization at no additional cost.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements, but requires customization at additional cost.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors), but requires customization at additional cost.
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions, but requires customization at additional cost.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number, but requires customization at additional cost.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps, but requires customization at additional cost.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but requires customization at additional cost.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information, but requires customization at additional cost.
- **Payment Notes**: Lets you include notes on payments through administrative forms.
- **Payment Reporting**: It's not possible to pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.

- **Other Payment Issues**: Lets you void payments, make refunds, and place payments on hold, but these are simply statuses that don't synch with accounting. It's not possible to update payment details (e.g., general ledger account, fund, etc.) in batch or create payments in batch, although you can batch update statuses. There is no ability to track in-kind and quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded, but this requires customization at additional cost.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but requires customization at additional cost.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but this requires customization at additional cost.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year, but requires customization at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, but this requires customization at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires customization at additional cost.
- **What-Ifs**: Lets you set up "what-if" scenarios, but requires customization at additional cost.
- **Budgeting and Grant Requests**: Budgeted line items can be set up to automatically create grant requests.
- **Program-Related Investments**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports, actions, or queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Program reports can be set to automatically run and send to individuals or groups, but this requires customization at additional cost.
- **Visual Reports**: It's not possible to create, view, and export data in a visual graphic representation, e.g., charts and graphs.
- **Individual Dashboards**: The system cannot provide "dashboard" views that summarize the grants currently relevant to each individual user, or let users create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Does not provide users a "task list" upon sign on.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. Audio and video attachments require Flash, and so cannot be viewed on the iOS operating system. However, Android-based mobile devices play audio and video attachments.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. Audio and video attachments require Flash, and so cannot be viewed on the iOS operating system. However, Android-based mobile devices play audio and video attachments.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its server.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. Versioning of custom fields is possible, but not recommended.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design elements.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's not possible to define custom language sets based on user, group, or giving program without customization.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.

- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support from 8:30 a.m. to 5 p.m. MST, as part of the yearly support and maintenance fee.
- **Online Support**: The vendor offers an interactive custom built GO Helpdesk at gograntsonline.org/help. They conduct monthly training webinars and record/edit training tutorials that are posted to the Helpdesk for streaming.
- **Manuals and Documentation**: The vendor provides manuals and documentation. The manual is divided into searchable, easy-to-read segments to allow feedback from clients.
- **Training**: The vendor provides initial training, which can be onsite, at no additional cost. Each client is assigned a project lead who answers questions and does training. The vendor spends approx. three months with the client during the intake phase to adapt their version of the GO system to their needs and processes. During this time, client staff are trained.
- **User Support Forums**: User support forums or discussion groups are available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1974 ; GrantsOnline™ has been in use by clients since January 2010.
- **Client Base**: The vendor reports that they have 32 clients. Breakdown by foundation type is 5 percent private and 95 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 9
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

WIZEHIVE

WizeHive's Grant Management System offers a combination of features and affordable pricing that will make this Online hosted system an attractive option for smaller grantmakers. It is approachable, with a polished layout and collapsible side navigation menus that make it easy for users to find their way around the system. WizeHive's Grant Management System scores well in grant tracking and online applications, and easily configurable grant review workflows bolster an already solid application review process. However, WizeHive's Grant Management System is less strong when it comes to creating letters or other print communication, as there is no mail-merge functionality. An organization with five users, 10 grants per year, and only light online application and review functionality could pay as little as $2,000 in the first year. An organization that receives more than 500 applications annually and requires more-robust donor management capabilities might pay closer to $7,000 per year.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes. It's possible to build reports to show the specific percent or dollar allocations across these codes.
- **Splitting Codes**: It's not possible to split grants across program codes without customization.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: Grants and applications are only searchable by EIN, legal name, and appID. Searching by grant and program cycles depends on system setup, which could be configured during initial consultation.
- **Handling Paper Applications**: An application received in paper can be easily entered into the system by starting a new application. Copies of the physical application can be scanned and saved in the system as a PDF or image file.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no built-in compliance for an industry-standard taxonomy in the system. Users have the ability to customize system menus and field labels to match a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: It's possible to view an organization's payment history by creating a custom form to capture that data from the organization. The results of forms are included in system reports.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.

- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations, but this must be set up by the vendor, possibly at additional cost.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: The client has the ability to add a form to the applicant portal to allow a grantee or applicant to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system does not automatically check each new registrant for potential duplicates, but could be configured to do so by the vendor at implementation.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system itself does not scan files for viruses at upload.
- **Mobile Device Application Access**: The system maintains different versions of each form optimized for computer or mobile viewing.
- **Unified Accounts**: Applicants can use the same account for all funders in the system; they will have to log in from each funder's portal separately, however.
- **Grantee/Foundation Collaboration**: The system allows reviewers and applicants to work back and forth on a proposal through email only.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Forms can also be embedded in your website as iFrames.
- **Character and Word Counts**: The system includes character and word counts for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In system Help**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.

- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Lets external reviewers print out full grant application information by converting applications and support materials into a PDF file or through a mail merge but not summaries of grants. Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Documents in the System**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. The system includes three pre-built workflows that can be used as templates. The client can set conditions for workflow override.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes can be customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Lets you click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits, such as Guidestar. The system supports tax verification for all 501(c) types.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. Checks the Specially Designated Nationals (SDN) list.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Lets you export letter or summary information for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system does not support third-party electronic signature services, like DocuSign.
- **Printed and Electronic Templates**: The system includes templates for electronic templates by default. The client can define print templates through Microsoft Word.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics. Users can contact the vendor to request delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Emails can be configured to send at a set time after any action, through a custom workflow.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers can be marked as no longer with the organization through a custom field or tag, which can be configured to exclude them from future communication.
- **Tracking Organizational History**: Users can create and run a report to see a history of all grants to an organization. Report results can be used to populate a new grant application.
- **Tracking Business Units**: The system can only track individual business units under a larger organization by creating subrecords or subforms.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization by allowing applicants to include additional contacts on the application form. Contacts tracked like this can be emailed or included in report results.
- **Customized Communication**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Automatically stores a record of all system-generated email for each grant. Phone calls or other communication can be manually recorded as notes.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.

- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system does not have the ability to support user groups for consistent data collection.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment, but requires you to create a view to dispay this information.
- **Check Requests**: Cannot easily generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years, but requires you to create a view to dispay this information.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements, but requires you to create a view to dispay this information.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions, but requires custom fields.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number, but you have to create a view to do so.
- **Accounting Integration**: Does not currently integrate with any accounting software packages. The vendor can build custom integrations at implementation.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes**: Can include notes on the record of the grant, but not on the payment record itself.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests, organizations, and contacts to an accounting system.
- **Other Payment Issues**: In general, payment issues are handled through the client's accounting system. Voided/refunded payments, in-kind payments, or payment details can be tracked in the system through custom fields on the grant record. It's not possible to update payment details (e.g., general ledger account, fund, etc.) in batch or create payments in batch, although you can batch update statuses.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas. Vendor recommends exporting data to Excel for hierarchical budget tracking by defined categories or program areas.

- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year, but requires customization at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **What-Ifs**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Program-Related Investments**: The system does not support interest repayments on PRIs without the use of custom fields.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants, but this functionality would have to be considered and accommodated during initial setup.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not, by default, contain report templates that align with sector-wide reporting standards. The vendor reports that they can build report templates upon client request.
- **Automating Reports**: Reports are dynamically generated, but there is no way to automatically send the results of a report to reviewers or users.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results.
- **Individual Dashboards**: The system includes a general overview dashboard, but this view cannot be customized by individual users.

Permissions and Workflow

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides two different internal interfaces—one for owner admin role and one for limited member role—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user, but you cannot customize the dashboard view.

- **Users Task Lists**: Provides users a “task list” when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: The client can create additional review pages, which can be customized to provide a more focused view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to, but not from, an external system. However, the vendor can create a custom integration with other systems, for additional cost.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device’s web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device’s web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Custom Fields**: Lets you add custom “internal tracking” fields for staff use.
- **Internal Tracking Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It’s possible for clients to define custom language sets for system navigation and menus, or create application forms in multiple languages.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: The labels for navigation and action items are not always intuitive, meaning that many users will require training specific to the system in order to effectively understand them, but the client has the ability to rename many, but not all, labels.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions expert users are likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone and email support at no additional cost. Standard response time is one business day. More rapid response times can be purchased at additional cost.
- **Online Support**: Vendor provides online or chat support at no additional cost.

- **Manuals and Documentation**: Documention is provided online in PDF and video format. The vendor also provides an online knowledgebase with videos on the system.
- **Training**: Vendor provides initial training for users and judges (on-site or online) at an additional fee. Initial online admin training is included at no extra charge.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2007. The system has been in use by clients since 2008.
- **Client Base**: The vendor reports that they have about 750 clients. Breakdown by foundation type is 50 percent private, 10 percent family, 10 percent community, 10 percent corporate, and 20 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 23
- **Percent of Survey Respondents Who Would Recommend the System**: 100 precent

ZOOMGRANTS

ZoomGrants is a well-laid out, hosted grants management solution centered on requests for proposals (RFPs) and the grant applications submitted in response to RFPs. Grant applications support an eligibility quiz in addition to the application itself, and can include fields for post-grant reporting. The system has robust support for the application process—applicants can manage their proposals and information for all funders using the system using one account, and can carry over contact information and other data from one application to another, or from a Letter of Intent to a proposal. Only applicants, not foundation staff, can make changes to organizational information. Search functionality is basic; ZoomGrants outputs information to an onscreen report and then requires foundation staff to rely on their browser's search functionality to hone in on what they need. Merge fields are supported for emails, but not for printed correspondence, which must be produced by exporting system data to a CSV file to be merged with Microsoft Word. A foundation with one RFP or grantmaking program could pay as little as $1,495 per year for ZoomGrants. Each additional grantmaking program adds $1,495 annually.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant project is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Codes**: No data available.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Only the grantee can update basic grant information like project names or codes.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching**: There is no traditional search functionality. Users must run a report to list all contacts and organizations in the system on-screen. From here you have to use your browser's search functionality to locate the information you want.
- **Handling Paper Applications**: An application received in paper can be entered into the system, but you must log in as a grantee to do so. System is designed so that grantees control their information rather than the grantor.
- **File Attachment Method**: The system stores attached documents in the database as objects, but can also be configured to store links to files.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.
- **Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy they desire.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, checkboxes, and text fields, without additional charges from the vendor. Radio buttons are used in lieu of dropdown fields.
- **Number of Online Application Forms**: Only supports one online application form per RFP, but multiple RFPs can be run simultaneously.

- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports two application stages, including an eligibility quiz and a more detailed application stage, as well as a post-funding stage for approved proposals.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The applicant has the ability to change their account information, user ID, and password, in order to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter Of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Does not allow applications to be formatted using rich text, groups of questions, or multiple pages.
- **Spell Checking**: Grantees cannot spell-check applications unless they have web browser-based spell-checking separate from the grant management system.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved when the applicant moves between fields.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Security Scan**: The system itself does not scan files for viruses at upload.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet, using responsive design.
- **Unified Accounts**: Applicants can use the same account for all funders in the system.
- **Grantee/Foundation Collaboration**: The system can let a grantee work on a proposal, save it as a draft, and allow a reviewer to comment or make suggestions, and work back and forth until a proposal is complete. For instance, a reviewer could add a comment visible to the applicant, and the applicant would be notified of the note's existence by email.

Form Design and Flexibility

- **Look and Feel**: Does not currently let you customize the colors, fonts, or navigation of your online application forms to match the look and feel of your website.
- **Character and Word Counts**: The system includes character and word counts for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In system Help**: The system includes online help for both end users and applicants, including videos and tips. The vendor provides technical assistance for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined, or been granted in the past.
- **Requirements Checklist**: Supports a checklist to define the information or documents you require from prospective grantees by allowing you to add fields to the grant application that are viewable only to administrators. These fields could comprise a checklist.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information by program or date.
- **Reviewer's Portal**: Users in the reviewers group are shown an appropriately limited interface.
- **Viewing Documents in the System**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Does not let you define automatic steps and rules for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest without customization.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Does not allow for automatic notifications when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for grant application summaries and choose which fields to include, but you cannot customize the fonts or colors.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Does not let you print letters in a single step, but you can print each one individually. It is possible to print summaries for a series of grants or grant applications in a single step, but only by generating a custom report.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system has limited ability to support electronic signatures through a custom text box, but cannot provide independent secure verification.
- **Printed and Electronic Templates**: There are no default templates for electronic or tablet view, but the system supports the creation of PDFs for board meetings.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Lets you see the number of emails successfully sent and the recipients, but not the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, up to 14 days days in advance of an event, but general emails cannot be scheduled to send in the future.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system does not provide any specific spell-checking ability for emails generated in the system, but as a browser-based solution, this is possible through the browser itself, if enabled.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units**: Does not currently let you track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each RFP, but cannot set up any default set of requirements that applies to all grants. You could manually copy requirements from one RFP to another.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: From the grant application you can see which requirements have been met.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.

- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Online Progress Report Submission**: No data available.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. You can create custom application for each RFP.
- **User Groups**: The system does not support user groups to collect uniform data.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Does not easily support payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors) without customization.
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in a single currency per RFP.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Does not currently let you set up payment controls to ensure that only certain staff can change payment information; only the admin role can change payment information.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments which carry the coding attributes of associated requests, organizations, and contacts.
- **Other Payment Issues**: Voided payments could be recorded in the system as "declined"; the system has the ability to track quid pro quo and in-kind payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.

- **What-Ifs**: Lets you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Program-Related Investments**: The system does not currently support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Cannot search or filter for grants within the system. This can only be accomplished by exporting the files to CSV and search from Excel.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users, but cannot include logos or headers without exporting to Excel.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Standard Reports**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.
- **Automating Reports**: Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: There is no ability to create, view, and export data in a visual graphic representation, e.g., charts and graphs.
- **Individual Dashboards**: The system provides a dashboard view that summarizes the grants currently relevant to each individual user. Users cannot create multiple unique dashboards.

Permissions and Workflow

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no ability to customize these roles or what permissions they have. There are four roles: admin, senior admin, reviewer, and applicant.
- **Field-Level Permissions**: It's not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides four different internal interfaces—admin, senior admin, reviewer, and applicant—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: The system provides a dashboard view that summarizes the grants currently relevant to each individual user. Users cannot create multiple unique dashboards.
- **Users Task Lists**: Does not provide users a "task list" upon sign on.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on roles, but not rules.

Data Access

- **Data Export to other formats**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system.
- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device [**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Radio buttons are used in lieu of dropdown fields. These values are customizable.
- **Custom Fields**: The system lets you create a limited number of custom fields with the same permissions as system-standard fields. Some existing field names can be customized, but not all. The system keeps a log of when fields are created or changed for historical documentation.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.
- **System Extendibility**: Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program, but can translate the text displayed based on the language settings of the grantee's computer.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: Navigation and action items are labeled intuitively, so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support without additional cost, during business hours.
- **Online Support**: No online or chat support is available for the system.
- **Manuals and Documentation**: The vendor provides manuals and documentation, including slide shows, videos, and tip sheets.
- **Training**: The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled. In-person training can be scheduled for a nominal fee.
- **User Support Forums**: There are user support forums or discussion groups available.

Installation and Maintenance

- **Installation and Maintenance**: This Online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2002; ZoomGrants has been in use since 2002.
- **Client Base**: The vendor reports that they have about 36 clients. Breakdown by foundation type is 80 percent government and 20 percent various private foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondents Who Reported Using the System**: 13
- **Percent of Survey Respondents Who Would Recommend the System**: 100 percent

APPENDICES

APPENDIX A: RESEARCH METHODOLOGY

Eligibility Criteria

The constituency for grants management systems can be divided into two broad groups: software for private foundations (including corporate and family foundations) and software for community foundations. We decided that this report would focus on grants management software for private foundations, so we narrowed our list by eliminating packages aimed primarily at community foundations.

Further, we decided our definition of a grants management system would include only systems capable of managing the full grant cycle, and which are offered as free standing products rather than part of a foundation "back office" management service. Systems on our list that we knew met these criteria were included on our final roster, and we emailed an eligibility questionnaire to vendors of systems less known to us to determine whether their software fit our grants management system definition. We also disseminated widely a call for participation through the lists of the Technology Affinity Group (TAG) and the Grants Managers Network (GMN). Through this process, we rounded out our final roster of 28 systems to review.

Product Selection

We started with a list of grants management systems that included products known to Idealware, the Technology Affinity Group, and the Grants Managers Network .

From this list, we invited both vendors who participated in our 2011 report and vendors of products that we knew met our selection criteria to demo their grants management solution for our 2013 report. We then emailed an eligibility questionnaire to vendors of products we were not familiar with.

Based on responses to our questionnaire, five products did not meet our eligibility criteria for this report. Two vendors declined to participate in this report: True Tandem Dynamic Solutions because their product is not generally offered without their consulting services, and Agate Software's IntelliGrants, who did not give us a reason for opting out. Another vendor, NimbleNet, did not respond to repeated attempts to contact them for this report, and another vendor included in previous versions of the report, Grantium G3, declined to participate in the update process.

This left us with 28 grants management systems to review for our report.

Evaluation Criteria

We started with the criteria used for our 2011 grants management report, then solicited feedback on our criteria from five experts in the grants management field. In August of 2013, we also posted our evaluation criteria for public review on a wiki site, and disseminated a call for comment and revision to software vendors and to the lists of the GMN and TAG community. Idealware read and responded to each of the comments from close to 50 different contributors.

That process, paired with our expert interviews, resulted in the addition of 44 new and revised criteria to use when evaluating the 28 grants management systems in this updated edition of our report. Our features comparison is based on a rubric derived from these evaluation criteria. This rubric is, in turn, based on the one we used in the first and second editions of this report, with some changes that reflect both the addition of the new criteria and the current state of the field of grants management systems.

From late August to early October 2013, Idealware conducted detailed software demos of 28 grants management packages. These packages were evaluated against more than 180 criteria for reviews. The results can be found in the previous section.

Customer Experience Survey

In September 2013, Idealware distributed a customer experience survey through the lists of the GMN and TAG community, as well as directly to the vendors of the grants management systems included in this review. We had 637 people take the survey. For each review, we've published how many people reported using the grants management software in the survey, and a score based on their reported experience with the training, support, and implementation offered by the systems' vendors. For many systems, the sample size was very small, and this survey should not be taken as a rigorously scientific research method. It's our hope that the survey represents a facet of the grants management landscape that is different from the function-based write-ups in this guide.

APPENDIX B: HOW WE EVALUATED THE SYSTEMS

The reviews are much easier to understand when the vast amount of information gathered is considered through the lens of typical grantmaker needs. In order to more easily compare strengths and weakness across packages, we created a rating system based on the common needs expressed in interviews and the features on which packages typically differed. While every organization will need to decide on the criteria that is important for their own needs, and thus may rate criteria quite differently than we did, this rating system can provide a starting point for comparison.

<table>
<tr><th colspan="4">Internal Tracking</th></tr>
<tr><th>None / Not Acceptable</th><th>Basic</th><th>Solid</th><th>Advanced</th></tr>
<tr>
<td>Does not meet the criteria for Basic.</td>
<td>Can track a project name, request amount, and organization.
Can track the program with which a grant is associated.
All information for each grant project is linked together through its entire lifecycle.
You can easily retrieve grant information and status.</td>
<td>Meets Basic criteria, plus:
Lets you attach documents to a grant record, possibly by logging into the system as an applicant to do so.
Can track by program cycle or board meeting date, and by categories such as geographic or population-based codes.
Lets you search grants and applications by a number of criteria, including organization's legal name, EIN, application ID, program, and grant cycle.
Lets you easily update basic grant information like project names or codes throughout the process. OR, applications that are received in paper can be easily entered into the system without logging into a separate interface as a grantee.
Lets you easily view related records and data across records.</td>
<td>Meets Solid criteria, plus:
Lets you easily attach external documents to a grant record, without logging into a separate interface as a grantee.
Lets you define custom categorization codes for tracking and reporting.
Lets you easily update basic grant information like project names or codes throughout the process.
Lets you easily enter applications received in paper into the system without logging into a separate interface as an applicant.
Lets you perform batch updates of defined coding and other fields.
The system stores attached documents in the database as objects rather than links. OR, the system uploads attached documents to the server and stores a link to that uploaded file in the database.
Can track by percentage or dollar allocation across programs.</td>
</tr>
</table>

Online Applications—Grantmaker Experience

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you collect application information online and view it. • Can include custom dropdowns and text fields in applications. • Lets applicants upload files as part of their application.	Meets **Basic** criteria, plus: • Can include file uploads, dropdowns, checkboxes, and text fields in application fields. • Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, and/or a more detailed proposal stage. • Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required. • Supports multiple logins for grantees on a single application. OR, grant application forms can branch at all stages, possibly through customization. • There is a virus scan or security feature to prevent malicious files from being uploaded onto the application or downloaded onto the system.	Meets **Solid** criteria, plus: • Lets you create new online applications without additional charges from vendor. • Lets you customize a confirmation message to be sent upon submission of an application. • Lets applicants upload a wide variety of files as part of their application. • The system allows both individual applicants and organizations to apply for grants from the same grant program. • Supports multiple logins for grantees on a single application, AND grant application forms can branch at all stages, possibly through customization. • Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, a more detailed proposal stage, and as many other stages as needed.

Online Applications—Grantseeker Experience

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets applicants view their status online. • System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.	Meets **Basic** criteria, plus: • Lets applicants save their application and return to it at a later point. • Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal. • Applicants can easily view or print applications at any stage in the process.	Meets **Solid** criteria, plus: • Both applicant and grantmaker can quickly and easily reset lost credentials. • The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them. • The system checks the email address of each new registrant to make sure it doesn't already exist in the system, and prompts the user if it is a duplicate.

Form Design & Flexibility

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you, or the vendor, customize online application forms with your logo, at a minimum. • Lets you adjust character or word counts for at least some fields in online forms.	Meets **Basic** criteria, plus: • Lets you adjust character or word counts for all fields in online forms. • Lets you adjust character count, and displays prominently how many characters remain on a field. • Lets you customize in-system help for applicants or grantees. • OR Vendor can customize in-system help for applicants or grantees.	Meets **Solid** criteria, plus: • Lets you, or the vendor, customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, at no additional cost. • Lets you adjust word as well as character count, and displays prominently how many words or characters remain on a field. • In-system help is customizable (by you or by the vendor) in the form of online videos, FAQs, wikis, or another sophisticated option.

Application Review

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Supports at least a single review comment and rating for each application. • Lets reviewers easily print grant summaries.	Meets **Basic** criteria, plus: • Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for or been given in the past. • External or internal reviewers can print grant summaries or full grant information (including attachments). Lets multiple reviewers each rate an application, with at least one comment and one numeric grade for each application. • Provides a simplified "portal" interface to allow reviewers to see and review grant applications without navigating the full grants management interface. • Proposal owner and management staff can be automatically notified when reviews are completed, either via email or within the system. • Supports checklist functionality to define what information or documents you require from prospective grantees. OR, provides strong online application functionality, including the ability to reopen online applications once they've been submitted if more information is required from the applicant.	Meets **Solid** criteria, plus: • Lets multiple reviewers each numerically rate an application on a number of different factors, and add comments. • Supports different information or scoring schemes for different programs. • Supports online viewing and reviewing of applications. • Lets you track external reviewers' interests, potential conflicts of interest, and geographic location or area of expertise and use those criteria to assign applications for review. • Lets reviewers see each other's comments and grades, if you allow it. • Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them. • Lets you define automatic steps and rules, or "workflow," for the grants review process.

501(c)(3) and OFAC Status

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you click on organizations to view their record and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar.	Meets **Basic** criteria, plus: • Lets you create a list of organizations in a format that can easily be used to check them against standard OFAC and other terrorist watch lists, potentially in a different system. • The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status.	Meets **Solid** criteria, plus: • Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. • Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. • Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). • Lets you perform checks and updates in batch. OR, the vendor will perform checks and updates in batch for you.

Letters & Board Dockets

None / Not Acceptable	Basic	Solid	Advanced
While letters and dockets are quite different from a process perspective, they are technically very similar, and most systems have a similar level of support for each.			
• Does not meet the criteria for **Basic**.	• Lets you print a view of each grant application. • Lets you insert mail-merge data into letters, possibly by way of downloading data into Microsoft Excel.	Meets **Basic** criteria, plus: • Lets you define a default format for grant application summaries and choose which fields to include. • Provides several standard letter and electronic templates that you can generate using grant record information.	Meets **Solid** criteria, plus: • Lets you define a default format for printing grant application summaries, choosing which fields to include, as well as customizing fonts, colors, and logos. • Lets you create letter templates that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. • Lets you print letters or summaries either individually or for a series of grants or grant applications in a single step. • Lets you view and customize individual letters before printing them. • The system provides support for electronic signatures, possibly with external verification.

Emails

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you send email through the system to a single individual.	Meets **Basic** criteria, plus: • Lets you send email through the system to a single individual or a group of people who meet particular criteria. Group emails are not sent as blind copies, but rather as one-to-one. • Lets you set up and send automatic emails based on certain events. OR, • lets you set up and send scheduled reminders to applicants and grantees.	Meets **Solid** criteria, plus: • Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. • Lets you set up and send scheduled reminders to applicants and grantees • Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports. • Lets you attach files to emails sent to individuals and groups.

Relationship Management

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization. • Lets you note interactions with a grantee with at least a single comment field.	Meets **Basic** criteria, plus: • Lets you associate multiple contacts with an organization, and define their relationships to you and to a specific grant. • Lets you keep a log of communications such as phone calls and emails with a particular contact or a grantee organization. • Lets you keep former staffers that were associated with a grant on an organization's record without making them active contacts for communications. • Can track individual business units under a larger organization. OR, lets you automatically capture emails from external email systems into grantee or organization records.	Meets **Solid** criteria, plus: • Automatically stores a record of all system-generated letters and emails for each grant. • Lets you keep a log of communications such as phone calls and emails with a particular contact at a grantee organization. • Can track individual business units under a larger organization. • Lets you communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact). • System allows you to automatically synchronize contacts with Outlook. OR, • system allows you to automatically export system contacts to Outlook or Exchange. OR, system • lets you automatically capture emails from external email systems into grantee or organization records.

Grant Requirements & Evaluation

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you easily see which requirements grantees have met, and which they have not.	Meets **Basic** criteria, plus: • Lets you define a default set of grant requirements and customize them for individual grantees. OR, lets grantees submit progress report information through online data fields. • Lets you store progress report information submitted by grantees in multiple data fields. • Can automatically email grantees to remind them about upcoming deadlines. • Lets grantees submit progress report information through online data fields.	Meets **Solid** criteria, plus: • Lets grantees view grant requirement deadlines online. • Emails to applicants can include information specific to the grant program in question. • Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports. • Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. • Supports evaluation metrics based on user groups—i.e., you can summarize and report on data based on grantee's programs, geographic location, or other criteria. • Data collection can branch based on type of grant.

Payments

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you define a payment schedule for each grant. • Lets you see what scheduled payments are upcoming. • Lets you see what payments have been made, including amount, date paid, and check number.	Meets **Basic** criteria, plus: • Can generate a report of the amount scheduled to be paid out in a given year (including carryover from previous years' grants). • Lets you see upcoming scheduled payments and whether the grantee has met requirements linked with that payment. • Supports payments to organizations other than the primary grantee (for example, fiscal sponsors). • Lets you include a note on a payment. • Supports grants in a single currency. OR, • allows for payments to be made contingent or conditional upon a specified grant or payment requirement. • Lets you pull reports on payments which carry coding attributes of associated requests, organizations, and contacts.	Meets **Solid** criteria, plus: • The vendor has experience in integrating with at least one external accounting software package (if the accounting system is not built in). • Can generate a paper check request for accounting. • Supports wire transfers by storing required information and confirmation codes for successful transactions. • Supports grants made in multiple currencies by storing currency and exchange rate information. • Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually. • Allows for payments to be made contingent or conditional upon a specified grant or payment requirement. • Lets you configure audit or security controls to ensure that only certain staff can change payment information. • Supports an automated payment approval process with configurable workflow steps. • Lets you void payments, make refunds, and place payments on hold, which are attached to workflows within the system. • There is the ability to update payment details and create payments (e.g., general ledger account, fund, etc.) in batch. • OR, there is the ability to track quid pro quo and in kind payments.

Budgeting			
None / Not Acceptable	**Basic**	**Solid**	**Advanced**
• Does not meet the criteria for **Basic**.	• Lets you track either the amount awarded or the amount budgeted in a particular year.	Meets **Basic** criteria, plus: • Can split grants across more than one program for budgeting purposes. OR, Lets you use previous years' budgets as a base and adjust them for current year.	Meets **Solid** criteria, plus: • Lets you choose whether to track either the amount awarded or the amount budgeted in a particular year. • Can track budgets in hierarchically defined categories or program areas. • Lets administrators view the impact a particular grant will have on future year payouts with a "what if" type feature. OR, lets you track interest repayments on PRIs (possibly through customization).

Querying and Reporting

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you run pre-packaged basic reports, such as a standard 990 report, upcoming payments, or the list of grants currently being reviewed.	Meets **Basic** criteria, plus: • Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants. • Lets you save reports that you create or modify. • Supports ad hoc reports, which can include nearly any field displayed to users, possibly by exporting data to Excel for formatting. • Virtually all system data—including the data entered into online applications, review forms, and grantee progress reports, if supported—can be included in reports. • Lets you quickly view favorite reports without navigating a much-larger set. OR, can make small updates to standard reports. • There is a process of running reports that is easy enough for casual users to run queries independently.	Meets **Solid** criteria, plus: • Supports ad hoc reports within the system, which can include custom data columns, datasets, sorting, grouping, logos, and headers. • Can make small updates to standard reports. • Reports can be set to automatically run and sent to individuals or groups. • Users can create their own multiple unique dashboards, or a vendor can do this for you. • Lets you quickly view favorite reports, and possibly queries and actions, without navigating a much-larger set. • Lets you save ad hoc reports that you create or modify. • Lets you search the contents of file attachments. OR, • lets you drill down for more information on some or all reports.

Permissions & Workflow

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you grant individuals access (or not) to certain large areas of system information, such as a module.	Meets **Basic** criteria, plus: • Has at least two different internal interfaces—for example, an admin view and a reviewer view—to provide a simpler experience for users with less complex needs. • Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log. • Lets you grant individuals granular access to view, edit, or delete data for a wide variety of system functions.	Meets **Solid** criteria, plus: • Lets you define user or group permissions on a field-by-field basis. • Provides "dashboard" views, which summarize the grants and tasks currently relevant to each individual user. • Lets you assign tasks, such as the review of a progress report, to particular users through workflow functionality. • Provides a standard, focused, roles-based view for management and board members. OR, assigns tasks to users based on rules and roles.

Data Access

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• All data stored within the database can be extracted by someone other than the vendor. OR, the vendor agrees to provide data in a standard file format (such as .csv) as part of the standard license agreement. • Lets you export core grant data, such as project name, program, and grant amount, into another file format, such as .xls or .csv, in a way that it can be used for further reporting.	Meets **Basic** criteria, plus: • Lets you export most data visible to users into another file format, such as .xls or .csv, in a way that it can be used for further reporting. • Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system. OR, • provides apps or views designed specifically for mobile devices (for any purpose).	Meets **Solid** criteria, plus: • Lets you export all data visible to users into another file format, such as .xls or .csv. • Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system.

Overall Customization

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you customize the information requested in online applications, if offered, potentially at additional cost. • Lets you store custom information submitted by grantees, such as application narratives or progress report metrics, in separate fields. • Lets you customize dropdown values for fields such as program or grant codes.	Meets **Basic** criteria, plus: • Lets you customize the information requested in online applications and review forms at no additional cost. OR, vendor will extensively customize system to your needs, potentially at additional cost.	Meets **Solid** criteria, plus: • Lets you add custom "internal tracking" fields for staff use, potentially at additional cost. • Lets you customize the names of fields displayed in the interface, potentially at additional cost. • Lets you add a virtually unlimited amount of custom fields, with an audit log to track their creation. • Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).

Ease of Use

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Most individuals could learn how to use the system with training.	• Users can easily find the actions they are most likely to take (possibly by looking through a considerable list of options). • The interface is polished looking (though potentially otherwise flawed).	Meets **Solid** criteria, plus: • The interface is polished looking and neatly laid out. • Navigation and action items are labeled intuitively. • Users can easily find the actions they are most likely to take. • The system pulls together the information and actions an expert user is likely to need.

Support & Training

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Vendor can be reached for questions. • Vendor provides either online or printed help manuals.	Meets **Basic** criteria, plus: • Vendor provides training, potentially at additional cost. • Vendor provides phone support.	Meets **Solid** criteria, plus: • Vendor provides unlimited phone and email support within a yearly fee or maintenance package. • Vendor provides initial training in person or via the internet at no additional cost, and additional training sessions can be scheduled.

Customer Experience with Support

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was below 1 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was within 1 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was above 1 point of our average score.

Customer Experience with Training

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding training was below .5 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding training was within .5 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding training was above .5 point of our average score.

Customer Experience with Implementation

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was below .5 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was within .5 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was above .5 point of our average score.

Stability in the Market

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• The software package has been in use by clients for more than one year. OR, the vendor reports that the software package has more than 10 clients.	Meets **Basic** criteria, plus: • The software package has been in use by clients for more than three years while supported by the same vendor. OR, the vendor reports that the software package has more than 20 clients. • The revenue earned from the software package covers the personnel and operational expenses required to support it.	Meets **Solid** criteria, plus: • The software package has been in use by clients for more than three years. • The vendor reports that the software package has more than 50 clients.

APPENDIX C: SUMMARY OF CHANGES TO RUBRIC FOR 2013 CONSUMERS GUIDE TO GRANTS MANAGEMENT SYSTEMS

These criteria have been added to the software demo process after the public comment period on Consumers Guide to Grants Management Systems wiki and interviews with five experts in the grants management space. For a full view of the public comments and Idealware's responses, see the wiki site at http://idealware-grants-mgmt.wikispaces.com/.

Internal Tracking

We added criteria about the ability to track data regarding program, geographic areas, and populations served; attaching all kinds of files to grant records; support for an industry-wide taxonomy within the system; and the ability to view related records and data across records.

Online Applications (Including Reuse of Information and Ease for Applicants)

We added criteria about support for individuals as well as organizations; eligibility branching for multiple applications; transfer of account and history between individuals; duplicate checking; security scans for attachments; mobile application capability; collaboration between staff and applicants; and unified accounts for grantees and applicants.

Form Design and Flexibility

We added criteria about sophisticated online form design capability; character and word counts; and in-system help.

Application Review

We added criteria about printing grant summaries; ease of viewing attachments; grant review workflows; scoring flexibility and aggregation; external reviewer profiles; deleting reviews sent in error; and automated worfklows about review statuses.

501(c)(3) and OFAC Status

We added criteria about the revocation lists; capability for both organizations and individuals; tax verification; linking to external sources like the Foundation Center; autopopulation of fields; audit trails; and batch update capabilities.

Letters and Board Dockets

We added criteria about support for electronic signatures; templates for electronic formats; and support for tablet-based and online board interactions.

Emails

We added criteria about the support for sending individual versus group emails; editing emails after they've been merged into a template; scheduling emails; and spell-check.

Relationship Management

We added a substantial number of criteria about tracking an individual's history with the organization over time; preserving the records of contacts no longer associated with organizations without having to delete them; automatically customizing communications based on the individual applicant/grantee's role within the organization; and synchronizing contacts from multiple organizations.

Grant Requirements and Evaluation

We added criteria about a system's ability to support branching data collection based on specific types of grants; the ability to create online progress report forms; scheduling and merging reminder emails; and user groups within the system to compare metrics.

Payments

We added criteria about check requests, notes on payments, and reports that preserve coding attributes; the ability to void, hold, refund, and otherwise alter payments; batch updates and creation; and tracking quid pro quo and in kind payments.

Budgeting

We added criteria about the ability for budget line items to connect to grant requests within the system; support for program-related investments; as well as a greater focus on scenario-planning and "what ifs."

Reporting

We added criteria about the general reporting approach of the system (i.e., is it for power users only?); favorite reports and queries; availability of standardized report formats from the grantmaking sector; automating reports; and the ability to create visual data representations, as well as a greater emphasis on dashboards.

Permissions and Workflow

We added a greater emphasis on the ability to configure one's own workflow.

Data Access

We added a question on the portability and integrity of system data.

Overall Customization

We added new criteria about availability and capability of custom fields; the customization of online information; and the ability to define custom language sets.

Ease of Use

We added a criterion about the modernity and up-to-datedness of the system's appearance and layout.

Support and Training

Most comments here are covered in the Customer Experience survey, such as information regarding updates. But we did add a criterion about the availability of print manuals online.

Stability in the Market

Most comments here would be difficult to evaluate using our methodology (e.g., "Is the underlying software architecture state-of-the-art, or does it lag behind its peers and the information technology industry in general?" would be difficult to assess).

Customer Experience

This is a new area of the report for 2013. Some of the comments were covered by Support and Training, and some are beyond the scope of this project (e.g., "Suggest asking how long they've had the system implemented. It would also be interesting to know how satisfied customers are based on how long they've had the system. Are long time users happier or less happy than new converts?"). We did add a question on whether issues from implementation were resolved in a timely manner.

Methodology

Comments on our methodology were out of the scope for this rubric review process, but we did respond to them on the wiki site.

Report Structure

Most comments were beyond the scope of this process, but we did respond to them on the wiki site. In response to comments that the evaluation chart is hard to understand, we will reevaluate the ways in which we organize the evaluation information we publish in the report this year, so that not all 28 systems are compared at once.

APPENDIX D: CUSTOMER EXPERIENCE SURVEY

1. What system do you use to manage your grantmaking process?

Other (please specify)

2. About how long have you had the system you currently use?

3. Would you recommend this system to another grantmaker?

4. Do you agree or disagree with the following statements regarding *support* for the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I've never contacted this vendor	I don't recall
It's generally easy to reach someone with a particular problem or questions.	○	○	○	○	○	○
In general, the people I've reached were able to solve my problem/answer my question.	○	○	○	○	○	○
In general, my questions or issues are resolved within an hour or two.	○	○	○	○	○	○
In general, my questions or issues are resolved within 24 hours.	○	○	○	○	○	○
The vendor provides useful online avenues in which to research an issue or solution myself.	○	○	○	○	○	○
The vendor is consistently available and prompt in terms of responding to a question or other need.	○	○	○	○	○	○
I generally hear from the vendor about pending updates to the system.	○	○	○	○	○	○
In general, it is clear to me what is in an update.	○	○	○	○	○	○
In general, updates to the system are relevant to our needs.	○	○	○	○	○	○

5. Does your vendor offer multiple tiers of support (Basic, Premium, etc.)?

6. If so, did you elect to purchase the premium support level?

7. Do you agree or disagree with the following statements regrading the *implementation* of the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in implementing the software
The implementation of the software went according to schedule.	◯	◯	◯	◯	◯	◯
The implementation of the software went according to budget.	◯	◯	◯	◯	◯	◯
The representatives of the vendor during the implementation phase were knowledgeable.	◯	◯	◯	◯	◯	◯
The system delivers on the promises the vendor made during the sales process.	◯	◯	◯	◯	◯	◯
Small issues from implementation were resolved within a few days.	◯	◯	◯	◯	◯	◯
Larger issues from implementation were resolved within 1-2 weeks.	◯	◯	◯	◯	◯	◯

8. Do you agree or disagree with the following statements regarding the *training offered by the vendor*?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in training on the software
The training offered by the vendor covers areas of interest to me and my organization.	◯	◯	◯	◯	◯	◯
The training offered by the vendor is generally helpful.	◯	◯	◯	◯	◯	◯
The training offered by the vendor is generally easy to understand.	◯	◯	◯	◯	◯	◯
The training offered by the vendor is generally easily accessible.	◯	◯	◯	◯	◯	◯
In general, the quality of training offered by the vendor is worth what we pay for it.	◯	◯	◯	◯	◯	◯

9. If using a hosted/online solution, about how often has there been a time when you couldn't access the system?

ABOUT THE REPORT PARTNERS

About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit www.idealware.org to learn more or view our hundreds of free articles, resources, and reports.

About the Grants Managers Network

Grants Managers Network's mission is to improve grantmaking by advancing the knowledge, skills, and abilities of grants management professionals and by leading grantmakers to adopt and incorporate effective practices that benefit the philanthropic community. Grants Managers Network is a leader in identifying and promoting effective grantmaking practices through field-wide change efforts. Learn more at www.gmnetwork.org.

About the Technology Affinity Group

TAG is an active community of professionals responsible for information and communications technology in the philanthropic sector. The community provides the highest quality resources and learning opportunities in an open and trusted environment. Visit www.tagtech.org to learn more or join TAG.