A CONSUMERS GUIDE TO GRANTS MANAGEMENT SOFTWARE

REPORT UPDATE

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Reviews of ZoomGrants and Common Grant Application added Jan 2012

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EXECUTIVE SUMMARY

Grants management software helps grantmakers save time, make their processes more effective and transparent, and can even transform the way they do business. The options in grant management systems are growing every year, and there are currently more solid systems than ever before.

This expansion of the market is great for grants managers, but the array of choices can make it complicated to decide what system makes sense for any given organization. This report explores the systems available to help private foundations accept and review applications and track grants throughout their life cycles, with detailed comparisons of 22 systems.

There's a huge variety of grants management systems, ranging from basic options at only a few thousand dollars a year to robust solutions for large foundations starting at $100,000 or more.

Community foundations differ from private foundations in several important areas, and are therefore not included in this report—we also have a report on grants management software for community foundations that we'll release soon after this one.

What Systems Are Available?

There's a huge variety of grants management systems, ranging from options for small foundations at only a few thousand dollars a year, specialty options for niches like arts grantmaking or medical research foundations, and robust, completely configurable solutions for large foundations starting at $100,000 or more.

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. Consider **Bromelkamp's Akoya.net, Closerware GrantMaker, Foundant Grant Lifecycle Manager, MicroEdge GIFTS Online, Oceanpeak's Common Grant Application, WizeHive Grant Manager** or **ZoomGrants**.

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, such as **Bromelkamp Akoya.net, Bromelkamp First Pearl, Good Done Great Grant Management System, MicroEdge GIFTS, MicroEdge GIFTS Online, NPower Foundation Grant Manager, SmartSimple GMS for Private Foundations** or **Solpath Fluxx.**

Complex online data collection needs

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. Consider **CyberGrants, Good Done Great Grant Management System, JK Group, PhilanTech PhilanTrack** or **NPower Foundation Grant Manager.**

Complex application review needs

Some systems provide very little functionality to support complex review processes, while others provide complex scoring mechanisms, online forms to allow outside reviewers, and even specialized functionality geared toward reviewing arts projects or medical research applications. If review functionality is a core priority, consider **WESTAF GrantsOnline™, Dulles Technology Partners WebGrants, GrantStream GrantRight™** or **Altum proposalCENTRAL.**

Strong all-around functionality for the large foundation

If you need all of the above—and are willing to pay for it—large "enterprise" systems provide strong functionality and customization for a larger price tag. Consider **Altum Easygrants, Grantium G3, FusionLabs GrantedGE** or **MicroEdge GIFTS**.

What's Changed?

We released the first edition of our Consumers Guide to Grants Management Systems in 2008, and since then the field of systems has evolved substantially. The number of vendors offering tools has greatly expanded, providing many more options for smaller foundations at affordable costs. Online hosted systems are also becoming the norm. While a few traditional installed systems remain available, all the vendors in this report offer an online hosted option. These hosted systems can be compelling to grantmakers—they allow program staff to login to the system from anywhere with internet access, and tend to provide better support for online applications and online grantee communications.

On the higher end, systems are adding compelling features. Far more systems offer customization per user—for instance, to show a "dashboard" of the tasks a user is likely to want to take on, or to provide different interfaces for different types of roles. As an example, a grants manager might see an interface that allows sophisticated data management, while a program officer might see one that's pared down and easier-to-use. More advanced functionality, like branching in online forms and robust budgeting facility, have become far more common. The grants management system marketplace is becoming more vibrant, with healthy competition creating better systems for both small and large grantmakers.

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Comparing the Systems

How do all these packages compare? It's impossible to say in a few quick paragraphs, but this report provides both a high-level look at the systems and a closer look at the details behind them. Quick paragraph blurbs describe the core strengths and weaknesses of each system, and a comparison chart (starting on page 30) shows how they stack up across a set of 17 different criteria. Finally, the reviews of the systems provide a detailed, six-page summary of each system that shows how it addresses more than 125 different criteria.

The grants management software marketplace has never had a better set of options to support effective and efficient grantmaking, and this report helps grantmakers understand how all these options compare.

CONSIDERING GRANTS MANAGEMENT SYSTEMS

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 applications 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 less than $3,000 a year, while sophisticated, highly customizable systems might 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—we also have a report on grants management software for community foundations that we'll release soon after this one.

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. They are not included in this report.

What's Changed Since the Last Report?

We released the first edition of our *Consumers Guide to Grants Management Systems* in 2008, and since then, the field of systems has evolved substantially. The number of vendors offering tools has greatly expanded, providing many more options for smaller foundations at affordable costs.

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All of this is good news for grants managers, but it can make it even more complicated to decide what system makes sense for you. Don't assume that a system provides the best mix of features and price for your needs just because a number of other people are using it.

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.

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

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.

With a few recent additions to the market that cost less than $4,000 per year, there are more lower-cost options than there ever have been before. For most organizations that make more than a handful of grants per year, they're worth a look.

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: Hosted Online 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.

Hosted Online 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.

But recent well-publicized 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.

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 that cost less than $3,000 per year all the way up to very sophisticated, customized systems for $200,000 per year or more.

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 weaker in online data collection. They typically cost more in the first year than the online systems, ranging from $15,000 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 backup 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. This report does not cover specific service providers. While we do include a summary of one system offered by a service company as a standalone product, in general, if you're considering this option, you'll want to look well beyond the features offered by their grants management system.

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; our soon-to-be-released follow-up report will look at community foundations and the specialized systems designed to meet their needs.

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.

If you are looking into building a custom system, consider starting with a flexible platform, such as Salesforce.com or Microsoft's SharePoint. This strategy can give you solid base functionality that can be customized and built on to meet your needs. Salesforce.com is a highly extendable online system with strengths in managing constituent information and internal workflow. SharePoint provides a toolset with sophisticated document management facilities and support for integrating online and offline data. Both are currently used for basic grants management by at least a few foundations.

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 you 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.

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, project name, organization and contact person), 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.

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

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 code based on your strategy? Grantmakers sometimes need to make similar updates to data across several grant records. Some grants management systems nicely facilitate bulk changes to data while others leave you to make such updates on a record-by-record basis.

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. However, grants management software varies widely in its support for online applications. Some barely support them at all; others are built around them.

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.

All systems allow you to customize the fields that you collect, but some make it easy for you to add or update fields yourself. Other 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.

It's important to consider the grant applicant's experience in using the online application form. For example, online forms can "time out" unexpectedly and lead to the loss of significant time and data entry.

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 Interest 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.

It's important to consider the grant applicant's experience in using the online application form. 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 or warning applicants to save. Applicants should also be able to save incomplete applications and return to them. Most online application tools let applicants use browser-based spellchecking to proof their work, but a few packages include built-in spellcheckers. Want more information about this area? Our S*treamlining Online Grant Applications: A Review of Vendors* report takes a detailed look at the software features that can make the grant application process easier for both grant applicants and grantmakers.

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. 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.

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.

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?

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 an application summary, or 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 find 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's 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? 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 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?

501(c)(3) & 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.

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) lists of individuals and organizations with terrorist ties. Although there's some debate about the appropriateness or effectiveness of this requirement, 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.

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 easy supply board members with overall documents relevant to a whole grant cycle (for example, a letter introducing the grant making priorities for the cycle).

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). A few solutions in this report offer email delivery reports including open, click-through and unsubscribe rates, but most do not.

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.

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 to other organizations—will go through. It's not likely, but it does happen, and it can take weeks to get yourself 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 opting for a third party broadcast email tool instead.

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 nonprofit, or different units within a larger organization. This is particularly important for large institutions such as universities, where different divisions or researchers may apply separately for grants.

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

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, some systems allow you to easily capture other emails you've sent externally—for example, through Outlook. 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" as well—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 login 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 2010?

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

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?

If your organization requires paper check requests for accounting, make sure the system supports them. 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.

Many grants management systems integrate with external accounting systems like QuickBooks or Dynamics GP (formerly Great Plains). 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, grantmakers will often 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.

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

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.

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 the method you prefer.

The ability to base budgeting on a previous year's budget can save time and effort for many organizations. Several packages allow this, while some even allow you to create budgets for multiple years or to build "what-if" scenarios.

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).

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?

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 provide a lot of them. Is there some way to customize or filter the list or to bookmark your preferred reports?

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.

If you're looking for specific information about a grant application, it can be useful to search the content of attachments to grant records. Some grants management packages provide this functionality, though usually through additional cost modules or integration with Microsoft SharePoint.

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

Roles and Permissions

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. Some 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 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?

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.

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, larger foundations may want a system that manages the workflow—for example, assigning grants or tasks to individuals or roles and providing a customized "dashboard" view that spells those tasks out for each staff member. Systems that support configurable workflows can simplify grants management for organizations with complex 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 Open Database Connectivity (ODBC) 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?

As mobile devices grow in popularity, users look increasingly to work from their smartphones and tablet computers. While any web-based system is, in theory, accessible via mobile web browsers, it's not likely to be practical to use on a small mobile screen unless the vendor provides a view or "app" optimized for mobile browsers. Given their larger screen size relative to smartphones, using a web-based grants management system from a tablet computer can be practical without any specialization. Mobile device access is new territory, so it pays to get detailed information from the vendor if this is something that interests you.

Overall Customization

Most grant management systems are designed to support a variety of different 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.

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.

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.

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.

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 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, which are 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 offer 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 customers typically able to reach someone knowledgeable when they call for support?

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?

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

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's important to know what hardware and software will be required to use the system you choose. For most online hosted systems, a major web browser is likely all you need. For installed systems and 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 is 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 likely isn't yet at a very stable point, and their long-term viability is more of a risk.

Specialized Needs

This report focuses on the core grant 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 upfront fee for purchase and installation, anything from a few thousand dollars to hundreds of thousands. Many offer an a-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 of the first-year license costs, 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-synch 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 hosted online packages, but are less expensive in terms of ongoing vendor fees. Keep in mind that the cost for the software itself is likely to be only a small piece of what you'll pay to implement a new grants management system. Costs for consultants, configuration, data conversion, user training, necessary new hardware and more can take the price of a news grants management system to twice or even three times that of the actual software package.

The comparison chart in the next section includes price estimates for each system, for both a minimal implementation of the package typical for small organizations and for 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?

How do the available packages compare? Below, you'll find summaries and a comparison chart. We also took a careful look at all 20 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.

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. ➜ **See our detailed review starting on page 62.**

Foundant Grant Lifecycle Manager

At $6,000 for each two-year contract and a $1,500 one-time setup fee, Foundant Grant Lifecycle Manager is a polished and friendly 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 it has only basic support for payments and budgeting. The system 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. ➜ **See our detailed review starting on page 74.**

WizeHive Grant Manager

Wizehive's Grant Manager 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. Grant Manager scores well in grant tracking, online applications and email capabilities, and easily configurable grant review workflows bolster an already solid application review process. However, Grant Manager has minimal support for relationship management—it's difficult to associate multiple grants with a single organization, or multiple contacts with a single grant. A 501(c)(3) organization that needs only light online application and review functionality could potentially use Grant Manager free of charge. An organization that receives more than 500 applications annually, and more-robust donor management capabilities, might pay closer to $6,000 per year, plus setup fees ranging from $2,000 to $8,000. ➜ **See our detailed review starting on page 158.**

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. On the other hand, much grantmaker functionality is notably absent, and relationship management is all but non-existent, 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. While the system does not support saving a list of favorite reports for easy access, 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. A small foundation could use Common Grant Application for around $1,270 per year, while a large foundation could expect an annual fee of about $6,700. ➜ **See our detailed review starting on page 128.**

ZoomGrants, by 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. 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 Standard. Each additional grantmaking program adds $1,495 annually. ZoomGrants Pro, required to access all the functionality covered in this review, requires an additional $2,495 annual subscription fee. ➜ **See our detailed review starting on page 164.**

As other inexpensive systems, consider **Bromelkamp's Akoya.net and MicroEdge's GIFTS Online**, listed under Flexible Relationship Management, below.

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.

Bromelkamp Akoya.net

Akoya.net, Bromelkamp's new online grants management system, is built on Microsoft's Dynamics CRM platform, and provides solid mid-level functionality for a great price. Akoya.net leverages 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, at additional cost, 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. To export all visible data from Akoya.net is currently an entity-by-entity manual process, 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 on their own. Akoya.net's initial setup fees start at $890 and $1,740 annually for the first user. Each additional user costs $660 per year. ➜ **See our detailed review starting on page 50.**

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 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. Also, an MS-SQL version of First Pearl is available that provides field-level security. Organizations that accept online grant applications and need to build their own online forms will require Bromelkamp's eGrant.net and Builder modules, both at additional cost. A small foundation could expect to pay around $17,400 for the first year and $1,800 in annual recurring costs. ➜ **See our detailed review starting on page 56.**

Good Done Great Grant Management System

Built on Intuit's QuickBase online database platform, Good Done Great's Grant Management System is 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. While there are no delivery statistics available for such mailing projects, the vendor is willing to integrate Grant Management System with third party broadcast email services for an additional fee. There is no built-in support for gifts in multiple currencies, but this also can be added through vendor customization. Typical initial setup costs for Grant Management System start at $5,000 to $8,500. Annual recurring costs for a five-user system start at $3,000. ➜ **See our detailed review starting on page 86.**

MicroEdge GIFTS

Though some strong players have entered the grants management systems industry, MicroEdge GIFTS is still the most widely used solution by far. Its large user base makes it easy to find user communities and consultant support. 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. ➜ **See our detailed review starting on page 110.**

MicroEdge GIFTS Online

GIFTS Online is MicroEdge's fully web-accessible, online hosted entry into the grants management arena. The look and feel will be familiar to anyone who has used the vendor's MyGIFTS module, and in fact, at times seems to be a fleshed-out version of that product. GIFTS Online offers many of the strengths of GIFTS fully loaded with optional modules, with strong suits in tracking grant information, mail merging and application review. Freed from the fixed interface of its installed older sibling, GIFTS Online can offer customized views per user and per role, including customizable user dashboards. On the other hand, the system's design in its current guise does not allow users the flexibility to do things like modify letter templates, create online forms or do ad-hoc reporting. MicroEdge will perform these services for GIFTS Online customers at no charge. An entry level client could acquire GIFTS Online for about $4,000 per year. A typical client that accepts 250 applications annually might pay about $16,000 per year. ➜ **See our detailed review starting on page 116.**

NPower Foundation Grant Manager

NPower Foundation Grant Manager is an online hosted solution built on top of the Salesforce platform. It 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 login through a separate, but tightly integrated, portal application. Users will want to visit the Salesforce AppExchange to add Conga Composer for mail-merge capability. Email sent from Foundation Grants Manager 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. A connector, at additional cost to implement, lets users log email sent from Outlook and synchronizes their Outlook contacts with the system. The initial deployment cost for Foundation Grant Manager is $25,000, with $5,000 per year for support and maintenance. Salesforce charges $360 annually per user beyond the 10 free user licenses it donates to nonprofits. ➜ **See our detailed review starting on page 122.**

SmartSimple GMS for Private Foundations

A very traditional, unadorned web interface belies the power and flexibility of SmartSimple Grants Management. 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 content 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 is particularly strong, with support for payment workflows and multiple currencies. SmartSimple GMS generally costs between $10,000 and $13,500 in the first year. Annual support and maintenance is calculated on a per-user basis. "Core users," such as grants administrators and program officers, are billed at $1,140 per user, per year. Internal users with more limited access needs are charged $180 annually, and external users—like external reviewers or board members, for example—pay between $24 and $48 annually, but with a $2,400 per year minimum covering up to 100 concurrent external users. ➜ **See our detailed review starting on page 140.**

Solpath 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, but does not support complex ad-hoc reports—for instance, users cannot define what columns or sums should be included. As an open source package, however, a qualified programmer could enhance reporting functionality and build any other features a client might need. Fluxx boasts flexible, powerful automated workflow facility that support grants review and payment approval processes, in addition to allowing you to easily set up reminders for grantees and staff, and to assign tasks to users based on schedules and events. Fluxx is an open source package, and is free to install and use. There are costs, however, if you would like implementation assistance and ongoing support and maintenance. First year costs start at about $15,000 with an annual recurring cost of $10,200 for support and maintenance. . ➜ **See our detailed review starting on page 146.**

For complex online data collection needs

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.

JK Group

JK Group 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. Reporting facilities are limited by lack of support for favorite reports, and while users can filter existing reports to display the data they want, they can't save modified reports or create new ones. However, the vendor can build reports. JK Group's grants management solution typically costs between $10,000 and $20,000 to set up, and from $10,000 to $20,000 annually, including support and maintenance. ➜ **See our detailed review starting on page 104.**

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 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 limited, with only basic support for tracking communications with grantees, and no way to easily define parent/child relationships for organizations in the system. Though you can't configure ad hoc scheduled or event-triggered emails, the system can generate automatic emails based on a number of action-triggers. PhilanTrack's pricing starts at $4,000 annually with another $4,000 in first year setup costs. ➜ **See our detailed review starting on page 134.**

CyberGrants

CyberGrants offers an online hosted solution with a particularly strong base of corporate foundation clients. Because the vendor declined to participate in any of our research processes, we haven't been able to form a detailed picture of functionality. Past conversations with customers painted a picture of a tool with generally 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. The customers we spoke with paid an initial setup fee of between $8,000 and $30,000, and then a yearly fee of $2,000 to $3,000 per system user. (We were not able to review this system in detail).

Other systems strong in online data collection include **NPower Foundation Grant Manager** and **Good Done Great Grant Management System**, both listed under Flexible Relationship Management, above.

Complex application review needs

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

WESTAF GrantsOnline™

Newly built from the ground up, WESTAF's polished and friendly GrantsOnline™ is the successor to CultureGrants Online™. 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. While generally strong in internal tracking, the system carries over from its predecessor a 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 additional implementation cost. While reporting facilities are powerful and flexible, there's no ability to see a list of favorite reports. Pricing for GrantsOnline™ 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. ➜ **See our detailed review starting on page 152.**

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. ➜ **See our detailed review starting on page 68.**

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 drop-down 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 $18,000 and $25,000, with first year setup fees generally starting around $30,000. ➜ **See our detailed review starting on page 98.**

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. ➜ **See our detailed review starting on page 44.**

Strong all-around functionality for the large foundation

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.

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 such bulk processes as sending emails, printing letters or creating reports. The system does not, however, easily support branching online forms. It 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. ➜ **See our detailed review starting on page 38.**

Grantium G3

Grantium G3 is an enterprise level system that can either be self-hosted, or access through the vendor's servers via a Software as a Service model. While government entities compose the bulk of Grantium's user base, it has many features attractive to large private sector grantmakers as well, with solid functionality for online applications, reviews, requirement scheduling, online progress reports, payments, and communications tracking. Online forms can include sophisticated, spreadsheet-like calculated fields to assist in collecting budgeting information. An additional cost Cognos business intelligence module is required for some mail merge and reporting functionality. The system is fairly open and flexible, with the ability to easily customize online forms, integrate external reporting tools, or even build custom data feeds using their API. Grantium refused to disclose any pricing information this year, but as of our 2009 report the vendor reported that the system started around $100,000 for the first year and about $25,000 in yearly ongoing costs ➜ **See our detailed review starting on page 92.**

FusionLabs GrantedGE

GrantedGE is an installed system that integrates with Blackbaud's Raiser's Edge, Financial Edge and Blackbaud Net Community (BBNC) to complement the functionality of those systems with solid grants management features. Tight integration with Blackbaud's systems allows you to click a link on an organization to see more information about it in Raiser's Edge, or to view a window from Financial Edge to print checks. BBNC also handles event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting (some BBNC-linked services come at additional cost). Fusion Lab's online form module, Proffer, supports reasonably sophisticated formatting of forms, but there's no support for branching, and users are not allowed more than one grantee login per organization. License costs range from around $20,000 to $85,000, with an equivalent amount for setup costs—the average first year price is about $60,000. Raiser's Edge is required, Financial Edge is recommended. ➜ **See our detailed review starting on page 80.**

As another system that can support large foundations with complex needs, consider **MicroEdge GIFTS,** listed in the Flexible Relationship Management section, above.

COMPARING THE SYSTEMS

As part of this research, we reviewed 22 grants management software packages in detail to determine how they compared in a number of critical areas. The chart below compares these packages on a set of specific criteria. Keep in mind that more bubbles on the chart don't mean that the system will work best for you. Not all criteria are necessary, or even useful, to every grantmaker.

What's more, we've reviewed the systems to determine which vendors support specific tasks, but not the manner in which they accomplish them. Use this chart to get an overall sense of the various packages' strengths and weaknesses in areas important to most private foundations. If you're making decisions about grants management systems, we strongly suggest that you go beyond the chart, read the detailed reviews of the products you are considering, and demo those systems that seem to make sense for your organization.

These ratings are based on a detailed set of rating criteria. The details for each system are included in the "Reviews of the Grants Management Systems" section. The framework used to determine the ratings is included in Appendix B.

Use the comparison chart on the next page to compare the 22 grants management software packages we reviewed.

COMPARISON CHART

When there are two ratings, the first represents the system with the most basic configuration, while the second shows what's possible with the addition of modules or customizations at additional cost. The prices shown give the approximate range of costs for small and large grantmakers, and for minimal and then all functionality. For the majority of these vendors, prices can vary for each individual implementation.

	Altum Easygrants	Altum proposal-CENTRAL	Bromelkamp Akoya.net	Bromelkamp First Pearl
Small grantmaker, basic functionality*				
First year cost	not recommended for this size	not recommended for this size	$7.1K	$17K
Ongoing yearly cost	not recommended for this size	not recommended for this size	$6.2K	$1.8K
Larger grantmaker, all functionality*				
First year cost	$150K - $250K	$40K - $60K	$33K	$43K
Ongoing yearly cost	$30K - $50K	$30K - $50K	$15K	$7.2K
Internal Tracking	Good	Fair	Good	Excellent
Online Applications	Excellent	Good	None to Good	None to Excellent
Applications Review	Excellent	Excellent	None to Excellent	None to Excellent
501(c)(3) and OFAC Status	None to Good	None	Good	Good
Letters & Board Dockets	Excellent	Good	Excellent	Excellent
Emails	Good	Good	Good	Excellent
Relationship Management	Good	Good	Excellent	Good to Excellent
Grant Requirements & Evaluation	Excellent	Excellent	Fair to Excellent	Fair to Excellent
Payments	Good	Fair	Good	Good
Budgeting	Good to Excellent	None	Good	Fair
System Querying & Reporting	Good to Excellent	Fair to Good	Excellent	Good
Roles & Permissions	Good	Fair	Excellent	Good
Data Access	Excellent	Excellent	Excellent	Excellent
Overall Customization	Excellent	Excellent	Good to Excellent	Excellent
Ease of Use	Excellent	Fair	Good	Fair
Support & Training	Good	Excellent	Excellent	Excellent
Stability in the Market	Good	Excellent	Fair	Excellent

• None ◎ Fair ○ Good ● Excellent

* Small: 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.

Large: 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.

When there are two ratings, the first represents the system with the most basic configuration, while the second shows what's possible with the addition of modules or customizations at additional cost. The prices shown give the approximate range of costs for small and large grantmakers, and for minimal and then all functionality. For the majority of these vendors, prices can vary for each individual implementation.

	Closerware GrantMaker	Dulles Technology Partners WebGrants	Foundant Grant Lifecycle Manager**	FusionLabs GrantedGE	Good Done Great Grants Management System	Grantium G3***
Small grantmaker, basic functionality*						
First year cost	$3.5K	$10K	$4.5K**	$10K + cost of Raisers Edge	$12K	About $100K***
Ongoing yearly cost	$3K	$6K	$3K**	$2.4K + cost of Raisers Edge	$3K	About $25K***
Larger grantmaker, all functionality*						
First year cost	$12K	$150K	$4.5K**	$85K + cost of Raisers Edge	$31K	$100K+***
Ongoing yearly cost	$12K	$18K	$3K**	$20K + cost of Raisers Edge	$9.1K	$25K+***
Internal Tracking	Excellent	Good	Good	Good	Excellent	Good to Excellent
Online Applications	Good	Good	Fair	Fair	Excellent	Excellent
Applications Review	Good	Excellent	Good	Excellent	Good to Excellent	Good to Excellent
501(c)(3) and OFAC Status	•	• to Excellent	Excellent	Good to Excellent	Good	• to Excellent
Letters & Board Dockets	Good to Excellent	Fair	Fair	Excellent	Excellent	Fair
Emails	Fair	Excellent	Fair	Good to Excellent	Good to Excellent	Good
Relationship Management	• to Fair	Fair	•	Good to Excellent	Good to Excellent	Good
Grant Requirements & Evaluation	Good	Good	Excellent	Fair	Excellent	Excellent
Payments	•	Good	Fair	Good	Good to Excellent	Good
Budgeting	•	Fair	Fair	Good	Excellent	Good to Excellent
System Querying & Reporting	Good	Fair	Fair	Excellent	Excellent	Good
Roles & Permissions	Fair	Fair	Fair	Fair	Fair to Excellent	Excellent
Data Access	Fair	Excellent	Fair	Excellent	Excellent	Excellent
Overall Customization	Excellent	Excellent	Excellent	Good	Excellent	Excellent
Ease of Use	Good	Good	Good	Good	Excellent	Excellent
Support & Training	Good	Good	Excellent	Excellent	Excellent	Excellent
Stability in the Market	Fair	Fair	Excellent	Excellent	Excellent	Good

• None Fair Good Excellent

* Small: 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.

Large: 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.

** Foundant footnote: Prices listed are for one year, but the vendor requires the purchase of two-year licenses.

*** Grantium footnote: Based on 2009 prices. Grantium refused to disclose 2011 pricing data for this report.

When there are two ratings, the first represents the system with the most basic configuration, while the second shows what's possible with the addition of modules or customizations at additional cost. The prices shown give the approximate range of costs for small and large grantmakers, and for minimal and then all functionality. For the majority of these vendors, prices can vary for each individual implementation.

	GrantStream GrantRight™	JK Group	MicroEdge GIFTS	Microedge GIFTS Online	Npower Foundation Grant Manager	Oceanpeak, Inc Common Grant Application
Small grantmaker, basic functionality*						
First year cost	$48K	$20K	$19K+	$7.1K	$30K	$1.3K
Ongoing yearly cost	$18K	$10K	$6K+	$7.1K	$9.4K	$1.3K
Larger grantmaker, all functionality*						
First year cost	$75K	$30K	$75K+	$19K	$34K	$7K
Ongoing yearly cost	$25K	$30K	$15K+	$19K	$13K	$7K
Internal Tracking	Excellent	Good	Good to Excellent	Good	Excellent	Fair
Online Applications	Fair	Excellent	None to Good	Good	Excellent	Fair
Applications Review	Good to Excellent	Good	None to Good	Good	Good	Fair
501(c)(3) and OFAC Status	Good	Good	Excellent	Good	Good	Fair
Letters & Board Dockets	Excellent	Excellent	Excellent	Excellent	Good to Excellent	Fair
Emails	Fair	Good	Good to Excellent	Good	Excellent	Fair
Relationship Management	Fair to Good	Good	Excellent	Good	Excellent	None
Grant Requirements & Evaluation	Fair to Good	Good	Fair to Excellent	Good to Excellent	Good	Fair
Payments	Fair to Good	Good	Excellent	Good	Good	Fair
Budgeting	Good	Good	None to Good	None to Good	Excellent	Fair
System Querying & Reporting	Good	None	Good	Good	Excellent	Good
Roles & Permissions	Fair to Good	None	Fair to Excellent	Excellent	Excellent	Fair
Data Access	Fair	Excellent	Excellent	Fair	Excellent	Fair
Overall Customization	Good to Excellent	Excellent	Fair to Excellent	Excellent	Excellent	None
Ease of Use	Good	Good	Good	Excellent	Excellent	Excellent
Support & Training	Good	Excellent	Good	Excellent	Excellent	Excellent
Stability in the Market	Excellent	Excellent	Excellent	Good	Good	Fair

• None Fair Good Excellent

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

Large: 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.

When there are two ratings, the first represents the system with the most basic configuration, while the second shows what's possible with the addition of modules or customizations at additional cost. The prices shown give the approximate range of costs for small and large grantmakers, and for minimal and then all functionality. For the majority of these vendors, prices can vary for each individual implementation.

	PhilanTech PhilanTrack	Smart Simple GMS for Private Foundations	Solpath Fluxx**	WESTAF Grants-Online™	WizeHive Grant Manager	ZoomGrants
Small grantmaker, basic functionality*						
First year cost	$8K	$17K - $25K	$15K**	$7.5K	$2.9K	$1.9K
Ongoing yearly cost	$4K	$7K - $15K	$10K**	$4.5K	$2.4K	$1.5K
Larger grantmaker, all functionality*						
First year cost	$36K	$25K - $100K	$75K**	$21K	$8K	$7K
Ongoing yearly cost	$11K	$12K - $20K	$24K**	$35K	$6K	$7K
Internal Tracking	Good	Excellent	Good	Good	Excellent	Fair
Online Applications	Good	Good	Good	Good	Fair to Good	Fair
Applications Review	Good	Excellent	Good	Excellent	Excellent	Good
501(c)(3) and OFAC Status	Good	Excellent	Good	None	Good	None
Letters & Board Dockets	Excellent	Excellent	Good	Good	Fair	Fair
Emails	Fair	Excellent	Good to Excellent	Excellent	Good	Fair
Relationship Management	Fair	Excellent	Excellent	Good	None	Fair
Grant Requirements & Evaluation	Good	Excellent	Good	Excellent	Excellent	Good
Payments	Fair	Excellent	Good	None to Good	Good	Fair
Budgeting	Fair	Good	Good	Good	Good	Fair
System Querying & Reporting	Good	Excellent	Fair to Excellent	Good	Good	Fair
Roles & Permissions	Fair	Excellent	Excellent	Good	Good	Fair
Data Access	Excellent	Excellent	Excellent	Fair	Fair	Fair
Overall Customization	Good	Excellent	Excellent	Good	Excellent	Good
Ease of Use	Good	Good	Good	Good	Good	Excellent
Support & Training	Good	Good	Excellent	Excellent	Good	Excellent
Stability in the Market	Good	Good	Fair	Good	Excellent	Good

• None Fair Good Excellent

* Small: 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.

Large: 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.

** Fluxx footnote: As an open source system, Fluxx can be downloaded without charge. These prices assume Solpath help in implementing and supporting the system.

HOW TO DECIDE

There are a number of options in grants management software packages. That's good, but it can make a decision 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 least-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.

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

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?

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 such bulk processes as sending emails, printing letters or creating reports. The system does not, however, easily support branching online forms. It 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

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor. You can update or create these online applications without additional charges from vendor, but doing so requires familiarity with a 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.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.

- **Application Data 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.
- **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.
- **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.
- **Applicant 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.
- **Applicant Previews**: 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.

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 simplied "portal" interface to allow reviewers to see and review grant applications more easily.
- **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**: Provides extensive functionality to 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**: There is no in-system support for checking 501(c)(3) status, but for a minimal extra cost the vendor could allow to you 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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria through a complex query.
- **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.
- **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, unless the client hosts the system themselves. In this case, emails are sent through clients' email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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.

- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) based on a library of standard forms without paying additional vendor fees. Less standard progress report forms can be created by the vendor, for an additional fee, or by anyone familiar with XML data structures and the ability to add new fields to a MS SQL database.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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**: 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Hierarchical Budget Tracking: Budgets can be tracked in hierarchically defined categories or program areas.

- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **Permissions Granularity**: You can affliiate 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 which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **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.
- **Custom Field Names**: Lets you customize field names.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms. However, if you need a form that is not included in their pre-defined form library, creating or updating forms will require familiarity with an XML data structure and the ability to add new fields to an MS SQL database, or hiring Altum 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, but possibly on a delayed scheduled depending on degree of 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 an expert user is 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.
- **Manuals and Documentation**: Online manuals and documentation are provided. Client can add their own process and procedure information to the help manuals. Context sensitive and searchable.
- **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 no support forums available for this system.

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 19 clients. Primarily private foundations and government, includes international clients in the UK and Canada.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

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.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date. Categories and codes can only be assigned post-award.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes. However, you can only assign categories to a grant after it has been approved as a grant.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating 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 login to the system as the grantee or request that the grantee makes the changes to their own grant application.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle. Search functionality is spread among multiple places depending on what you are searching for.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system, but to do so you must log in to the system as an applicant.
- **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.

Online Applications

- **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.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you choose from a large set of pre-defined application sections, with some limited customization. Application sections must appear in a specific order defined by proposalCENTRAL. The vendor can add additional fields for you, change labels or add or new sections--typically at no additional cost.
- **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**: Only supports two application stages: LOI and one additional stage.
- **Application Data 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.
- **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.
- **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, and can only include plain 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.
- **Applicant 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.
- **Applicant Previews**: 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.

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 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.
- **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**: Provides extensive functionality to 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. Customization of fonts, colors and logos is applied by the user in the Word output file the system produces.
- **Mail-Merging Fields**: 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.
- **Individual Letter Customization**: You cannot view or customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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**: 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Online progress report forms (for example, corresponding to different programs) can only be created by the vendor. This service is covered by the support and maintenance fee.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting, by generating a spreadsheet with information for checks.
- **View Annual Scheduled Payments**: 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 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 contingencies rather than enforcing them.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information.

Budgeting

- **Budgeting Method**: Budgeting not supported
- **Budget Reporting**: Budgeting not supported
- **Hierarchical Budget Tracking**: Budgeting not supported
- **Copying Budgets**: Budgeting not supported
- **Splitting Grants Across Programs**: Budgeting not supported
- **Multiyear Budgeting**: Budgeting not supported
- **What-Ifs**: Budgeting not supported

System Querying and Reporting

- **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**: 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, but requires a separate module. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of four predetermined 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 six 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 which 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.
- **Rule-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**: 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 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.

Overall Customization

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

- **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.
- **Custom Field Names**: Lets you customize field names.
- **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.
- **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.

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 to 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.
- **Manuals and Documentation**: The vendor provides administration manuals for all functionality, as well as online tutorials for applicants and reviewers.
- **Training**: The vendor provides initial training over the phone at no additional cost. They do 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

- **History**: Altum incorporated in 1997. ProposalCENTRAL began in 1999 with first production use in 2001.
- **Client Base**: The vendor reports that they have about 55 clients. Of these, 30 percent are government (state/federal) and 70 percent are private foundations.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

BROMELKAMP Akoya.net

Akoya.net, Bromelkamp's new online grants management system, is built on Microsoft's Dynamics CRM platform, and provides solid mid-level functionality for a great price. Akoya.net leverages 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, at additional cost, 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. To export all visible data from Akoya.net is currently an entity-by-entity manual process, 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 on their own. Akoya.net's initial setup fees start at $890 and $1,740 annually for the first user. Each additional user costs $660 per year.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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**: Does not easily let you perform batch updates of defined coding and other fields.

Online Applications

- **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 vendor, but requires eGrant.net module at additional cost.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **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.
- **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.
- **Application Data Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required, but requires eGrant.net module at

additional cost.

- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **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.
- **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 at regular intervals if you do not save manually.
- **Applicant 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.
- **Applicant Previews**: 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.

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, but requires a module at additional cost.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information, but requires a module at additional cost.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires a module at additional cost, but requires a module at additional cost.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, but requires a module at additional cost, but requires a module at additional cost.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, but requires a module at additional cost.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, but requires a module at additional cost.
- **Online Application Review**: Supports online viewing and reviewing of applications, but requires a module at additional cost.
- **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 a module 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, but requires a module at additional cost.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are

completed, but requires a module at additional cost.

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. This system checks against Guidestar.
- **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 CharityCheck.

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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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. Optionally, email can be sent through the client's email servers.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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, but requires a module at no additional cost.

Grant Requirements and Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **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, but requires customization 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 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 requires a module at additional cost.
- **Creating Online Progress Reports**: 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.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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.

Budgeting

- **Budgeting Method**: Budgeting features are designed to track only the amount awarded in a particular year, and not the total amount paid in a year.
- **Budget 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.

- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 which 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 module at additional cost.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.net 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 broswer.

- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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.

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 an expert user is 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.
- **Manuals and Documentation**: There is a simple Akoya.net help document, and MS Dynamics help text. Orientation videos and webcasts for basic functions are in development.
- **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, or from Mozilla, Chrome or Safari browsers with an Internet Explorer emulation plug-in.

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 four client. All are private foundations.
- **Sustainability**: The revenue earned from the grantmaking system does not yet cover the personnel and operational expenses required to support it.

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 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. Also, an MSSQL version of First Pearl is available that provides field-level security. Organizations that accept online grant applications and need to build their own online forms will require Bromelkamp's eGrant.net and Builder modules, both at additional cost. A small foundation could expect to pay around $17,400 for the first year and $1,800 in annual recurring costs.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system. Only a few basic fields (such as description or grant amount) are part of the core system, but additional fields could be added as a customization.
- **File Attachment Method**: The system uploads attached documents to the server and renames the file to a naming convention which begins with the record number.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields, but requires knowledge of Microsoft Access queries.

Online Applications

- **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 vendor, but requires eGrant.net module at additional cost.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **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.
- **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.
- **Application Data 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.
- **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.
- **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 at regular intervals if you do not save manually.
- **Applicant 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.
- **Applicant Previews**: 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.

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 requires a module at additional cost.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily, but requires a module at additional cost, but requires a module at additional cost.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, but requires a module at additional cost, but requires a module at additional cost.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, but requires a module at additional cost.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, but requires a module at additional cost.
- **Online Application Review**: Supports online viewing and reviewing of applications, but requires a module at additional cost.
- **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 a module 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, but requires a module at additional cost.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, but requires a module at additional cost.

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. This system checks against Guidestar. Organizations are checked automatically by Pearl on a regular basis, and Pearl keeps a copy of the verification PDF in the document manager.
- **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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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**: 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.

- **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.
- **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 requires 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 requires a module at additional cost.
- **Creating Online Progress Reports**: The vendor can create custom online progress report forms for you (for example, corresponding to different programs) at additional cost. Alternatively, an additional cost eGrant.net Builder module will let you build such forms yourself.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting, but you would need to build a report for this at no additional cost.
- **View Annual Scheduled Payments**: 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.
- **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 multicurrency 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.

- **Splitting Grants Across Programs**: Cannot track grants split across more than one program for budgeting 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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, requires vendor customization, possibly at additional cost. There is an MSSQL version of 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 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**: Does not let 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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 from a Mobile Device**: Does not let you see grant summary and grant details from a mobile or tablet device.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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 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.

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**: The user 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 you are viewing.
- **Optimization for Experts**: The system pulls together the information and actions an expert user is 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.
- **Manuals and Documentation**: The vendor provides documentation online.
- **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.

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; Pearl has been in use since 1997
- **Client Base**: The vendor reports that they have about 220 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.

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

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.
- **Application Data 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.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.

- **Viewing Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of a application, but that message can't be customized.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, but uses collapsible sections in place of multiple page funcationality.
- **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.
- **Applicant 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.
- **Applicant Previews**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The preview packet does not include uploaded documents.

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 stripped down "portal" interface to allow reviewers to see and review grant applications more easily.
- **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**: 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-Merging Fields**: 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 vendor at additional cost.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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.

Relationship Management

- **Tracking Grant 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 requires customization additional cost.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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 that applies to all grantees, but those requirements cannot be customized for individual grantees.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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/ACH payment/wire transfer 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.

Budgeting

- **Budgeting Method**: Budgeting not supported
- **Budget Reporting**: Budgeting not supported
- **Hierarchical Budget Tracking**: Budgeting not supported
- **Copying Budgets**: Budgeting not supported
- **Splitting Grants Across Programs**: Budgeting not supported
- **Multiyear Budgeting**: Budgeting not supported
- **What-Ifs**: Budgeting not supported

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, i.e., Evaluators, Report Administrators, and Grant Administrators, 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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 from a Mobile Device**: Does not let you see grant summary and grant details from a mobile or tablet device.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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 excludes extensively customized systems from the upgrade path.

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 an expert user is 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.
- **Manuals and Documentation**: Vendor provides a users guide and inline help text.
- **Training**: Vendor offers training via webinars.
- **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 2003. Grantmaker Closerware has been in general use since 2009
- **Client Base**: The vendor reports that they have 30 plus clients. Breakdown by foundation type is 65percent private foundations, 28 percent family foundations, 7 percent corporate/gov't
- **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.

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

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by organization's legal name, application ID, program and grant cycle, but not by EIN.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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**: The system supports two application stages, including an unscored eligibility quiz and an final application stage.
- **Application Data 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.

- **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.
- **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.
- **Applicant Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicants and the grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Applicant Previews**: 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.

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 easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a stripped down "portal" interface to allow reviewers to see and review grant applications more easily.
- **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 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 could be added through customization at additional cost.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard

OFAC and other terrorist watch lists, but could be added through customization at additional cost.

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-Merging Fields**: 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.
- **Invidividual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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**: 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.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 addition 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.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 is 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**: 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.
- **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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.

- **Custom Field Names**: Lets you customize field names.
- **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.

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 to need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support between 7am and 8pm ET, Monday through Friday.
- **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 40 clients, 50 percent government, 20 percent charity, 10 percent university, 10 percent art, 10 percent other
- **Sustainability**: Does revenue earned from the system cover its personnel and operational expenses?

FOUNDANT Grant Lifecyle Manager

At $6,000 for each two-year contract and a $1,500 one-time setup fee, Foundant Grant Lifecycle Manager is a polished and friendly 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 it has only basic support for payments and budgeting. The system 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.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Does not let you customize the colors, fonts, or navigation of your online application forms to match the look and feel of your website.
- **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**: The system supports two application stages, including a Letter of Intent stage and a more detailed proposal stage.
- **Application Data 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.
- **Reuse of Application Data**: Applicants can easily see sumbitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.

- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: It's not possible to send an automatic confirmation to a grantee upon submission of an application.
- **Application Formatting**: Allows grantmakers to 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.
- **Applicant 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.
- **Applicant Previews**: 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.

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 file attachments.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **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 potentials conflicts of interest.
- **Comment Sharing Among Reviewers**: Does not allow reviewers to see each other's comments and grades while reviews are in progress. Can be configured to allow reviewers to see aggregated comments for completed reviews.
- **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**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. This system checks against Guidestar.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself, via Guidestar integration.

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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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**: Lets you set up and send automatic emails based on certain events, such as online application submission, but only for four predefined events.
- **Schedule-Triggered Email**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant History**: Organization information must be re-entered for each grant, and there's no way to see a history of all grants to a particular organization.
- **Tracking Business Units**: Does not let you track individual business units under a larger organization.
- **Tracking Multiple Contacts**: Lets you associate just one contact for each grant application.
- **System Generated Communications Log**: Does not store any record of system-generated email or letters.
- **Outside 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. Organization comments are time and date stamped and identifies the logged in user
- **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.
- **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, 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 Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 is willing to integrate at addition cost.
- **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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Reporting**: Lets you enter only a single budget amount for your whole organization.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **Searching and Filtering**: Lets you run six pre-packaged basic reports, such as a standard 990 report, upcoming payments or the list of grants currently being reviewed, but not customize the reports or data shown in any way. The vendor states that significant improvements will soon be implemented, but their release is after our cutoff date for data collection.
- **Report Modification**: You cannot modify standard reports. The vendor states that significant improvements will soon be implemented, but their release is after our cutoff date for data collection.

- **Favorite Reports**: Lets you quickly view "most used" reports without navigating a much-larger set, but this list is is determined automatically. You cannot choose your own list of "favorite" reports.
- **Saving Modified Reports**: Does not let 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.
- **Hierarchical Summaries**: 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**: Substantial system data is unavailable for inclusion in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of the pre-determed 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 at least two 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**: 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.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for board evaluators, but not for management.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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 permits extensively customized systems to remain on the upgrade path.

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 to 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 without additional cost.
- **Manuals and Documentation**: Vendor provides online documentation, contextual help, and tutorials for board and staff reviewers.
- **Training**: The vendor provides initial training via the phone and a web demo at no additional cost. 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 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 January 2006. Grant Lifecycle Manager has been in use since February 2007.
- **Client Base**: The vendor reports that they have about 271 clients. Client breakdown by foundation type is 50 percent private, 10 percent community, 10 percent corporate, less than 5 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

FUSIONLABS GrantedGE

GrantedGE is an installed system that integrates with Blackbaud's Raiser's Edge, Financial Edge and Blackbaud Net Community (BBNC) to complement the functionality of those systems with solid grants management features. Tight integration with Blauckbaud's systems allows you to click a link on an organization to see more information about it in Raiser's Edge, or to view a window from Financial Edge to print checks. BBNC also handles event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting (some BBNC-linked services come at additional cost). Fusion Lab's online form module, Proffer, supports reasonably sophisticated formatting of forms, but there's no support for branching, and users are not allowed more than one grantee login per organization. License costs range from around $20,000 to $85,000, with an equivalent amount for setup costs—the average first year price is about $60,000. Raiser's Edge is required, Financial Edge is recommended.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system via a "data mapper" utility that maps areas of scanned in PDFs, Excel and Word files into application form fields.
- **File Attachment Method**: The system saves only the link (i.e., file system path) for attached documents.
- **Batch Updates**: Except for application status field, does not let you perform batch updates of defined coding and other fields.

Online Applications

- **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 vendor
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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**: Only supports five application stages which can be of virtually any kind, but only supports a "yes/no" eligibility quiz that is not automatically scored.
- **Application Data 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.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal, or copy and paste from a previous application.
- **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**: Allows grantmakers to format applications using groups of questions 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.
- **Applicant 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.)
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Applicant Previews**: 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.

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 stripped down "portal" interface to allow reviewers to see and review grant applications more easily.
- **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 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.

- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, but possible through Blackbaud integration 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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket. {need screenshots from vendor}

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**: 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 integratoin 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 at additional cost.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, but through third-party integration 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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 The Raisers Edge at additional cost.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook, but requires integration with The Raisers Edge at additional cost.

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.
- **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 requires integration with The Raisers Edge 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.
- **Online Progress Report Submission**: Grantees cannot submit progress report information through online data fields.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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**: Includes a robust, integrated accounting package.
- **Automated Payment Approval Process**: Limited support for payment approval workflows.
- **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.

Budgeting

- **Budgeting Method**: 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 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.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.

- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 is 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**: Provides "dashboard" views which summarize the grants currently relevant to each individual user, but the functionality is limited to display of standard reports and an overdue task list.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system, but the list is limited to overdue tasks.
- **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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Does not let you customize field names.
- **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 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.

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 an expert user is 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.
- **Manuals and Documentation**: Vendor provides a PDF manual.
- **Training**: Vendor offers monthly classes. Also performs annual regional traiing 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 vendor states clients need MS SQL server software, Windows Server, and Windows Terminal Services. Can be hosted by Blackbaud (which provides multi-tenant application hosting). Can also be hosted by GrantedGE for clients who prefer a segregated installation. Also requires The Raiser's Edge, The Financial Edge and for certain funtionality, BlackBaud Net Community. A stand-alone system is offered for those who don't need the functionality provided by The Raiser's Edge and The Financial Edge.

Vendor Background

- **History**: The vendor has been in business for over 20 years. GrantedGE has been in general use since 2006.
- **Client Base**: The vendor reports 65 clients for GrantedGE. The breakdown by foundation type is 10 percent to 15 percent private foundations, 75 percent-85 percent community foundations, and 5 percent to 10 percent religious foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

GOOD DONE GREAT Grant Management System

Built on Intuit's QuickBase online database platform, Good Done Great's Grant Management System is 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. While there are no delivery statistics available for such mailing projects, the vendor is willing to integrate Grant Management System with third party broadcast email services for an additional fee. There is no built-in support for gifts in multiple currencies, but this also can be added through vendor customization. Typical initial setup costs for Grant Management System start at $5,000 to $8,500. Annual recurring costs for a five-user system start at $3,000.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system by entering application information into the grant record.
- **File Attachment Method**: The system uploads attached documents to Amazon file storage and stores a link to that uploaded file in the database. Documents can also be stored nearer the system on QuickBase servers, but at an additional fee for over 1GB of space.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.
- **Application Data 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.
- **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.
- **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. You are warned to save your work after five minutes of inactivity before the session times out.
- **Applicant 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.
- **Applicant Previews**: 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.

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.
- **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, but requires vendor customization, at additional cost, to provide functionality to help you assign applications for review based on these criteria.
- **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**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system checks against GrantR (a proprietary registry).
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists. The vendor expects to have support for OFAC checking by early 2012.

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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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, but requires a module at additional cost.
- **Email Delivery Reporting**: Does not let you see email delivery statistics, but the vendor could build an integration with a third party mass mailer 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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 an add-on at additional cost.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook, but requires an add-on 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 the vendor could build integration with accounting packages for additional cost, so long as there is an API available for the accounting system chosen.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in a single currency, but vendor could build multi-currency support at additional cost.
- **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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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, using QuickBase file storage included with the system.

Roles and Permissions

- **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, but requires configuration at additional cost.
- **User Dashboards**: Provides "dashboard" views which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Mobile Device Application Review**: Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet web browsers.
- **Grant Information from a Mobile Device**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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.

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 an expert user is 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.
- **Manuals and Documentation**: Vendor provides online knowledge base 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**: The vendor reports that they have about 122 clients. Breakdown by foundation type is 16 percent private, 16 percent family, 20 percent corporate and 4 percent government. An additional 44 percent are community foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

GRANTIUM G3

Grantium G3 is an enterprise level system that can either be self-hosted, or access through the vendor's servers via a Software as a Service model. While government entities compose the bulk of Grantium's user base, it has many features attractive to large private sector grantmakers as well, with solid functionality for online applications, reviews, requirement scheduling, online progress reports, payments, and communications tracking. Online forms can include sophisticated, spreadsheet-like calculated fields to assist in collecting budgeting information. An additional cost Cognos business intelligence module is required for some mail merge and reporting functionality. The system is fairly open and flexible, with the ability to easily customize online forms, integrate external reporting tools, or even build custom data feeds using their API. Grantium refused to disclose any pricing information this year, but as of our 2009 report the vendor reported that the system started around $100,000 for the first year and about $25,000 in yearly ongoing costs

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting, but the vendor creates these codes at additional cost.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system by entering it as a new request.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links. Could also be configured to upload attached documents to the server and store a link to that uploaded file in the database.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields, but requires customization at additional cost.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.
- **Application Data 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.
- **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.
- **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.
- **Applicant 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.
- **Applicant Previews**: 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.

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.
- **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, 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.
- **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**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed, but requires customization at additional cost.

- **OFAC Status Checking**: Lets you create a list of organizations and individuals in a format that can easily be used to check against standard OFAC and other terrorist watch lists in a different system.

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 requires a module at additional cost.
- **Mail-Merging Fields**: 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.
- **Invididual Letter Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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.
- **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, if the system is hosted by Grantium. Email for self-hosted systems is sent through the client's email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 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.
- **Accounting Integration**: Integrates tightly with an external accounting packages, but requires a module 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**: 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Grant Information from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device.

Overall Customization

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

- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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 only for vendor-modified systems.

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 an expert user is likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides 24/7 phone support, in addition to an incident reporting system as part of yearly support and maintenance.
- **Manuals and Documentation**: System document is available online.
- **Training**: The vendor provides initial training, which is included in implementation costs. Additional training packages are available.
- **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. The system can also be self-hosted by clients on their own web, application and database servers. {What are the hardware/software reqs for self-hosting?}

Vendor Background

- **History**: The vendor has been in business since 1998; G3 has been in use since 2005.
- **Client Base**: The vendor reports that they have about 25 clients. Breakdown by foundation type is 10 percent private foundation and 90 percent government clients.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

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 drop-down 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 $18,000 and $25,000, with first year setup fees generally starting around $30,000.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting, but requires customization, possibly for a fee.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **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.
- **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 two application stages, an eligibilty quiz and one other stage. Support for additional stages is possible via customization at additional cost.
- **Application Data 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.
- **Reuse of Application Data**: Applicants can easily see sumbitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Viewing Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of a 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, possibly at additional cost that could be included in the implementation cost estimate if necessary.
- **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.
- **Applicant 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.
- **Applicant Previews**: 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.

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**: 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.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process, but requires customization at additional cost.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, but requires customization, possibly additional cost.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, but requires configuration, possibly at additional cost.
- **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, 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**: Lets you view numeric review scores and report them as summary statistics—for example, average score, but requires customization, possibly at additional cost.
- **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**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. Checks against US IRS database as well as Canadian Revenue database, and a British registry.
- **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-Merging Fields**: 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, possibly 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.
- **Invididual Letter 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 board docket.

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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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. The vendor could build this functionality but would require significant work at additional cost.
- **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, but requires customization, possibly at additional cost.

- **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.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff, but 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 requires customization, possibly 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 requires customization, possibly at additional cost.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs), but forms must be cretaed by the vendor, possibly at additional cost.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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, at 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: Lets you quickly view favorite reports without navigating a much-larger set, but the capability to do so requires configuration, possibly at additional cost.
- **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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 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**: Provides a standard focused, roles-based view for management and board members, but requires customization at additional cost.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code, but this customization must be performed by the vendor, possibly at additional cost.

- **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.
- **Custom Field Names**: Lets you customize field names, but this customization must be performed by the vendor, possibly at additional cost. The vendor allows a set number of no-cost changes per contract year.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, possibly at additional cost. The vendor allows a set number of no-cost changes per contract year.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost. The vendor allows a set number of no-cost changes per contract year.
- **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.

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 an expert user is 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 8am to 6pm ET, Monday through Friday, as part of the yearly support and maintenance fee.
- **Manuals and Documentation**: Documentation is available via help pages of the application. Application forms include guidance for applicants. No PDF or hardcopy manuals are available.
- **Training**: Initial training is included in setup fees. Primary training session is face to face at the client's site. The vendor can also perform web-based training. Training is 1/2 da. There is also refresher training offered six weeks post-launch. Additional training can be purchased for an additional fee.
- **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 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.

JK GROUP

JK Group 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. Reporting facilities are limited by lack of support for favorite reports, and while users can filter existing reports to display the data they want, they can't save modified reports or create new ones. However, the vendor can build reports. JK Group's grants management solution typically costs between $10,000 and $20,000 to set up, and from $10,000 to $20,000 annually, including support and maintenance

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting, but only in the installed version. The vendor will create custom categorization codes for online hosted customers at additional cost.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **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 vendor, though the vendor typically configures these forms for clients.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program, though the vendor typically configures these forms for clients.
- **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 typically does this for clients.
- **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.
- **Application Data 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.
- **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.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of a application, but that message can't be customized. 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.
- **Applicant 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.
- **Applicant Previews**: 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.

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 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.
- **Grant Review Workflows**: The vendor can define automatic steps and rules, or "workflow," for the grants review process. Vendor can also make changes to work flow, often at no additional cost, depending on the complexity of the change.
- **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 potentials 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 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, but the vendor typically performs this service for clients.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself, but the vendor typically performs this service for clients.

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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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, 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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 grantee individually, but cannot set up any default set of requirements that applies to all grants.

- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Online progress report forms (for example, corresponding to different programs) are typically created by the vendor, often for an additional fee.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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, but system .
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: You cannot modify standard reports.
- **Favorite Reports**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Does not let you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Does not support any ad hoc reporting.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 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**: 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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names, but requires customization at additional cost.
- **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.

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 an expert user is 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.
- **Manuals and Documentation**: Documentation is provided online via a link from the administrative tool.
- **Training**: The vendor provides one day initial training on line for free. If in person training is need, the client pays travel expenses.
- **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 50 clients. All clients are corporate clients.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

MICROEDGE GIFTS

Though some strong players have entered the grants management systems industry, MicroEdge GIFTS is still the most widely used solution by far. Its large user base makes it easy to find user communities and consultant support. 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

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs, but requires a module at additional cost.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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, but requires a module at additional cost.

Online Applications

- **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 vendor, but requires IGAM module at additional cost.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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 requires IGAM module at additional cost.
- **Support for Multiple Stages**: The system supports a three-stage application with an eligibility quiz, LOI and proposal. Grantmakers can also create as many status report stages as they'd like.
- **Application Data 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
- **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.
- **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 accomodates 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.
- **Applicant Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Applicants and the grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Applicant Previews**: 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.

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 for internal reviewers. 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, but requires a module at additional cost.
- **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, but does not provide any specific functionality to help you assign applications for review based on these criteria.
- **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**: Automatically checks EINs against IRS Master Business File, and flags those not listed as 501(c)(3) nonprofits.
- **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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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**: 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, but requires a module at additional cost.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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, 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.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online, but requires a 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 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 requires a module at additional cost.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs), but requires a module at additional cost.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 package. 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.

Budgeting

- **Budgeting Method**: 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 Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but requires a module at additional cost.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year, but requires a module at additional cost.
- **Splitting Grants Across Programs**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires a module at additional cost.

- **What-Ifs**: Does not let you set up "what-if" scenarios.

System Querying and Reporting

- **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**: 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 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.
- **Hierarchical Summaries**: 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, additional cost.

Roles and Permissions

- **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, but only through a separate web 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 which summarize the grants currently relevant to each individual user, but only through a separate web interface provided by a module at additional cost.
- **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 web interface provided by a module at additional cost.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names, but requires a module at additional cost.
- **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.

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 an expert user is likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: The venor provides unlimited phone and email support as part of the yearly maintenance fee.
- **Manuals and Documentation**: Documentation is provided via manuals, a CD-ROM and an online knowledge base of help tips and best practices.
- **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 based on their specific role, such as program staff, financial officers, grants management and executives or other light users
- **User Support Forums**: User support forums or discussion groups are available.

Installation and Maintenance

- **Installation and Maintenance**: The system is installed on client's computers and servers. Requires Windows server and a database platform which can be MSSQL, MS Access or Oracle. Windows is required on end user machines.

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 2,400 clients using 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.

MICROEDGE GIFTS Online

GIFTS Online is MicroEdge's fully web-accessible, online hosted entry into the grants management arena. The look and feel will be familiar to anyone who has used the vendor's MyGIFTS module, and in fact, at times seems to be a fleshed-out version of that product. GIFTS Online offers many of the strengths of GIFTS fully loaded with optional modules, with strong suits in tracking grant information, mail merging and application review. Freed from the fixed interface of its installed older sibling, GIFTS Online can offer customized views per user and per role, including customizable user dashboards. On the other hand, the system's design in its current guise does not allow users the flexibility to do things like modify letter templates, create online forms or do ad-hoc reporting. MicroEdge will perform these services for GIFTS Online customers at no charge. An entry level client could acquire GIFTS Online for about $4,000 per year. A typical client that accepts 250 applications annually might pay about $16,000 per year.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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**: Batch updates are possible but must be handled by the vendor.

Online Applications

- **Creating Online Applications**: Lets you collect application information online, but vendor must set up application forms for you—there's no additional cost to edit existing forms but the vendor charges to create new ones.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program, but vendor must set up application forms for you—there's no additional cost to edit existing forms but the vendor charges to create new ones.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation --but vendor must perform the customization for you. Customization is included in cost of buidling application forms.
- **Application Branching**: Grant application forms can branch, but only at the eligibility quiz stage--the vendor must set up this branching for you. Branching configuration is included in cost of buidling application forms.
- **Support for Multiple Stages**: The system supports a three-stage application with an eligibility quiz, LOI and proposal. Grantmakers can also create as many status report stages as they'd like. The vendor must set up these stages for you. This set-up is included in cost of buidling application forms.

- **Application Data 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.
- **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.
- **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 accomodates 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.
- **Applicant Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Applicants and the grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Applicant Previews**: 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.

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.
- **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, but does not provide any specific functionality to help you assign applications for review based on these criteria.
- **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.
- **OFAC Status Checking**: The subscription for this system includes an annual check of all organizations and contacts in the database against an OFAC list. More frequent checks can be performed 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, but the vendor must configure the formats, typically at no additional cost. The vendor includes a number of templates in the initial implementation.
- **Mail-Merging Fields**: 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, but the vendor must setup these templates, typically at no additional cost. The vendor includes a number of templates in the initial implementation.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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, but the vendor must set up the templates, typically at no additional cost. The vendor includes a number of templates in the initial implementation.
- **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, but the vendor configures these schedule triggered emails during implementation. Additional event triggered emails must be configured by the vendor at additional cost.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, but must be configured by the vendor at additional cost.
- **Outbound Email Method**: Emails are sent through clients' email servers, potentially exposing them to blacklisting.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.
- **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 requires a onetime 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.
- **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 Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs), but the vendor needs to create these forms at additional cost.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 can integrate as a service 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.

Budgeting

- **Budgeting Method**: 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 requires a module at additional cost.
- **Budget Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals

(approved and pending), but requires a module at additional cost.

- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas, but requires a module at additional cost.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year, but requires a module at additional cost.
- **Splitting Grants Across Programs**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires a module at additional cost.
- **What-Ifs**: Does not let you set up "what-if" scenarios.

System Querying and Reporting

- **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. MicroEdge creates a number of custom reports during implementation. Further reports can be created at additional cost.
- **Favorite Reports**: 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.
- **Ad Hoc Reporting**: The vendor must create reports, typically at no addition cost.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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**: 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 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes, but the vendor must perform this work at no additional cost.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names, but at additional cost.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, but customization must be performed by the vendor, and is included in the cost of creating the form.
- **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.
- **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.

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 an expert user is likely to need so as to minimize the number of steps and clicks they need to take.
- **Support and Training**: Support and Training
- **Phone Support**: The venor provides unlimited phone and email support as part of the yearly subscription fee.
- **Manuals and Documentation**: Comprehensive online help is built into the system. Documentation is also provided in PDF.
- **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.
- **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 1985; GIFTS for Windows has been in use by clients since 2010
- **Client Base**: The vendor reports that they have about xxx clients. The vendor indicates that breakdown by foundation type is confidential.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

NPOWER FOUNDATION Grant Manager

NPower Foundation Grant Manager is an online hosted solution built on top of the Salesforce platform. It 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 login through a separate, but tightly integrated, portal application. Users will want to visit the Salesforce AppExchange to add Conga Composer for mail-merge capability. Email sent from Foundation Grants Manager 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. A connector, at additional cost to implement, lets users log email sent from Outlook and synchronizes their Outlook contacts with the system. The initial deployment cost for Foundation Grant Manager is $25,000, with $5,000 per year for support and maintenance. Salesforce charges $360 annually per user beyond the 10 free user licenses it donates to nonprofits.

Internal Tracking

- **Linking Grant Information**: All information for each grant project is linked together through it's entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Cycles**: You can track by program cycle or board meeting date.
- **Tracking by Categories**: You can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.
- **Batch Updates**: Lets you perform batch updates of defined coding and other fields.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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 rather than in response to values entered into 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.

- **Application Data 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.
- **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.
- **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**: Applications in progress are automatically saved, but immediately prior to session timeout rather than at regular intervals.
- **Applicant 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.
- **Applicant Previews**: 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.

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.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grant 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, but does not provide any specific functionality to help you assign applications for review based on these criteria.
- **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. This system checks the IRS database.
- **OFAC Status Checking**: Lets you create a list of organizations and individuals in a format that can easily be used to check against standard OFAC and other terrorist watch lists in a different system.

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-Merging Fields**: 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 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.
- **Invidividual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket, but requires customization 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. Higher volumes can be support via add-on modules 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.
- **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. Costs are incurred with NPower's implementation of Vertical Response
- **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. Salesforce caps outbound at 500 emails per day. Higher volumes can be support via add-on modules at additional cost.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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. 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each 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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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 external accounting software packages, but vendor is willing to integrate 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 customization at additional cost.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency, but requires 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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 requires a module at no additional cost.

Roles and Permissions

- **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 which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 from a Mobile Device**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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.

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 an expert user is 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 9am to 6pm ET as part of standard support and maintenance. Additionally, Salesforce provides 24/7 support that can be helpful in some cases.
- **Manuals and Documentation**: Documentation is available from a web help portal.
- **Training**: The vendor provides initial training online as part of implementation services. Onsite training is available at additional cost.
- **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**: 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 18 clients in production, 13 in launch or implementation phase, 5 in discovery phase. Private Foundations: 20 percent Family Foundations: 10 percent Corporate Foundations: 3 percent Government: 3 percent
- **Sustainability**: The revenue earned from the grant making system currently covers the personnel and operational expenses required to support it.

OCEANPEAK INC. 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. 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. While the system does not support saving a list of favorite reports for easy access, 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. A small foundation could use Common Grant Application for around $1,270 per year, while a large foundation could expect an annual fee of about $6,700.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle, but not by board meeting date.
- **Tracking by Categories**: Grant information cannot be tracked by category or codes. The system allows you to export data to Excel for more granular analysis and tracking.
- **Custom Categories**: Does not let you define custom categorization codes.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by legal name, application ID, and program and grant cycle, but not by EIN.
- **Handling Paper Applications**: Applications 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**: Does not easily let you perform batch updates of defined coding and other fields.

Online Applications

- **Creating Online Applications**: The system allows grantmakers to choose from a selection of standard questions, which can be dropdown, textbox or file upload fields. No checkbox fields are available. Grantees can configure additional questions, which may only be answered by a text field.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Does not let you customize the colors, fonts, or navigation of your online application forms to match the look and feel of your website. Grantmakers may include their logo on online 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**: The system supports two application stages, including: letter of intent and a main application stage.

- **Application Data 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.
- **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.
- **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, grouped questions or multiple pages. The grantmaker can select from a list of pre-built question and can also make their own, 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.
- **Applicant 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.
- **Applicant Previews**: 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.

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 can easily print grant summaries or full grant information.
- **Reviewer's Portal (changed "stripped down" to "simplified"**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **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 potentials 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**: You cannot report on numeric review scores as summary statistics—for example, average score. The system lets you export scores to Excel for analysis.
- **Review Status Notification**: Does not allow for automatic notifications 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. The system uses the IRS master business file.
- **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**: 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-Merging Fields**: 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.
- **Invididual Letter Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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**: 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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate one contact and one fiscal agent for each grant application.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications. These are posted to individual user message boards.
- **Outside 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.
- **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**: Cannot automatically email grantees to remind them about upcoming deadlines. Reminders must be sent manually by the administrator.
- **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**: Grantees cannot submit progress report information through online data fields. The system lets you upload reports to the grant record as attached documents.
- **Creating Online Progress Reports**: Lets you define only one online report form.

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.
- **Paper Check Requests**: Cannot generate paper check requests.
- **View Annual Scheduled Payments**: 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 associate with payments.
- **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 external accounting software packages, but vendor is willing to integrate, possibly at addition cost.
- **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**: 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 assoicated permissions are not configurable.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Reporting**: Does not track any budget information.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Spliting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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 and headers, but not logos.
- **Hierachical Summaries**: 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.

Roles and Permissions

- **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 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**: Provides "dashboard" views which summarize the grants currently relevant to each role.
- **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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 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.

Overall Customization

- **Dropdown Fields**: Some dropdown values are customizable but not all.
- **Internal Tracking Fields**: Does not let you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Does not let you customize field names.
- **Online Information Customization**: Does not let you customize the information requested in online applications and review forms.

- **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.

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 an expert user is 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.
- **Manuals and Documentation**: The vendor provides online manuals and documentation.
- **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 eight clients. Breakdown by foundation type is 50% private and family, 15% public, 15% community and 20% other.
- **Sustainability**: Operating and personnel expenses are not currently covered by the revenue the system generates.

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 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 limited, with only basic support for tracking communications with grantees, and no way to easily define parent/child relationships for organizations in the system. Though you can't configure ad hoc scheduled or event-triggered emails, the system can generate automatic emails based on a number of action-triggers. PhilanTrack's pricing starts at $4,000 annually with another $4,000 in first year setup costs.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle. Search functionality is 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**: Applications 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**: Does not easily let you perform batch updates of defined coding and other fields.

Online Applications

- **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.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: The eligibility quiz, but not other online forms, can be customized to match the look and feel of the website.
- **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**: The system supports a three-stage application with an eligibiilty quiz, LOI and proposal. Grantmakers can also create as many status report stages as they'd like. It's not possible for a proposal to automatically pull pre-populated application-specific fields for an LOI (such as project description), but defined organizational information would be automatically filled into every form.
- **Application Data 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.
- **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.
- **Viewing Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: When an application is submitted, the main user on the organizational account 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 you at regular intervals if you do not save manually.
- **Applicant 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.
- **Applicant Previews**: 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.

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 an 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.
- **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 potentials conflicts of interest.
- **Comment Sharing Among Reviewers**: Does not 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**: 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-Merging Fields**: 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 which then can be printed.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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 and groups 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.
- **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.
- **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.

Relationship Management

- **Tracking Grant 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 easily let you track individual business units under a larger organization.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Does not store any record of system-generated email or letters.
- **Outside 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**: You can manually define grant requirements for each grantee individually, but cannot set up any default set of requirements that applies to all grants.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper 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 Annual Scheduled Payments**: 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 external accounting software packages, but 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.

Budgeting

- **Budgeting Method**: 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 Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending), but you cannot do so before the start of the funding cycle.
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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 let you search within attached documents.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of the pre-determed 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**: 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, but the log is only accessible by the vendor.
- **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, but the tasks are manually entered by the user rather than system-defined.
- **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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Some field names can be customized but not all.
- **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.
- **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.

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 to 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 which phone support past the initial 30 days.
- **Manuals and Documentation**: Product manuals are available on the support site.
- **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 36 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.

SMARTSIMPLE GMS for Private Foundations

A very traditional, unadorned web interface belies the power and flexibility of SmartSimple Grants Management. 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 content 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 is particularly strong, with support for payment workflows and multiple currencies. SmartSimple GMS generally costs between $10,000 and $13,500 in the first year. Annual support and maintenance is calculated on a per-user basis. "Core users," such as grants administrators and program officers, are billed at $1,140 per user, per year. Internal users with more limited access needs are charged $180 annually, and external users—like external reviewers or board members, for example—pay between $24 and $48 annually, but with a $2,400 per year minimum covering up to 100 concurrent external users.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system from the new applications area of the Submission Manager module.
- **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.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.
- **Application Data 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.

- **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. This is done via a "copy" feature that lets you copy data from a previous online application and then make changes where necessary.
- **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. The auto-save interval is configurable.
- **Applicant 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.
- **Applicant Previews**: 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.

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.
- **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 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. The system uses the IRS database and also supports similar lists from the Canadian Revenue Agency and Inland Revenue of the UK.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. The OFAC check is supplied by OFAC Analyzer

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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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**: 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.
- **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. Alternatively, email can be sent through the client’s email servers or through third party email services which may require an additional fee.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: 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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Reporting**: Lets you enter a budget amount for each grants program and report on that information with actual (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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, but some formatting requires HTML/style-sheet expertise.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 which 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.
- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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**: 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 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, though some more complex changes may require vendor assistance possibly at 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.

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. Some labels seem overly verbose.
- **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 an expert user is 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. Can support applicants as well, but at additional cost.
- **Manuals and Documentation**: A wiki at smartsimple.org houses documentation for SmartSimple. There are also support videos on YouTube.
- **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 (see attached pricing sheet).
- **User Support Forums**: 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 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 20 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.

SOLPATH 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, but does not support complex ad-hoc reports—for instance, users cannot define what columns or sums should be included. As an open source package, however, a qualified programmer could enhance reporting functionality and build any other features a client might need. Fluxx boasts flexible, powerful automated workflow facility that support grants review and payment approval processes, in addition to allowing you to easily set up reminders for grantees and staff, and to assign tasks to users based on schedules and events. Fluxx is an open source package, and is free to install and use. There are costs, however, if you would like implementation assistance and ongoing support and maintenance. First year costs start at about $15,000 with an annual recurring cost of $10,200 for support and maintenance.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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.
- **Batch Updates**: Does not easily let you perform batch updates of defined coding and other fields.

Online Applications: Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **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.
- **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 a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed, but there is no support for eligibility quizzes.

- **Application Data 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.
- **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.
- **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 there is a manual save option.
- **Applicant Registration**: Applicants enter a username and password and are sent a confirmation email, but their registration must be approved manually by foundation staff.
- **Lost Credentials**: Lost credentials can easily be reset by the grantmaker, but not by applicants.
- **Applicant Previews**: Applications can be viewed by applicants at any stage, but a formatted "print view" is only available for completed applications.
- **Preview Packet**: The applicant can create a preview packet of their grant which includes either copies of all uploaded documents, or links to them.

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.
- **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.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
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- **Comment Sharing Among Reviewers**: Does not 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**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system uses Guidestar CharityCheck
- **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-Merging Fields**: 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.
- **Invididual Letter Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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.
- **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 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.
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- **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.

Relationship Management

- **Tracking Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
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- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Outside 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.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
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- **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 Reports**: Online progress report forms (for example, corresponding to different programs) can only be created by the vendor, often for an additional fee. Alternatively a user or consultant well-versed in HTML and style-sheets could create them.

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)
- **Paper Check Requests**: Can generate a paper check request for accounting.
- **View Annual Scheduled Payments**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
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- **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. QuickBooks integration is in the development pipeline.
- **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.
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Budgeting

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

- **Budget 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.
- **Copying Budgets**: Does not let you base current years' budget on the previous year.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: You cannot modify standard reports but you can configure a Fluxx "card" to display the data you want to see.
- **Favorite Reports**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Does not let you name and save reports that you create or modify. You can, however, filter and save a Fluxx "card" that displays the data you want to see.
- **Ad Hoc Reporting**: Does not support sophisticated ad-hoc reporting (for instance, defining what columns or sums should be included) but as an open source system, integration with report writers, such as Crystal Reports, could be built by qualified staff or consultants.
- **Hierarchical Summaries**: 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.
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- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.

Roles and Permissions

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- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis.
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- **Rule-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.

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- **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 and may require substantial training.
- **Optimization for Experts**: The system pulls together the information and actions an expert user is likely to need so as to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Fluxx Labs provides phone and email support to end users is included in support and maintenance fees.
- **Manuals and Documentation**: Detailed help documentation is available through the system.
- **Training**: Fluxx Labs 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 Fluxx Labs--Fluxx (io), or can be installed on client's 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 vendor (Solpath) has been running the Fluxx project 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 about 12 clients. Breakdown by foundation type is 50 percent private, 50 percent family foundations.

WESTAF GrantsOnline™

Newly built from the ground up, WESTAF's polished and friendly GrantsOnline™ is the successor to Culture-Grants Online™. 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. While generally strong in internal tracking, the system carries over from its predecessor a 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 additional implementation cost. While reporting facilities are powerful and flexible, there's no ability to see a list of favorite reports. Pricing for GrantsOnline™ 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.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle.
- **Handling Paper Applications**: Applications 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. The vendor expects batch update capability to be in place in 4th quarter 2011.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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.
- **Application Data 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.
- **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.
- **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.
- **Applicant 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.
- **Applicant Previews**: 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. This packet includes a listing of uploading documents but not the documents themselves nor links to the documents.

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.
- **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 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-Merging Fields**: 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.
- **Invididual Letter Customization**: You can view letters pre-print, but you cannot customized them.
- **Board Docket Attachments**: Lets you attach documents to board docket, but requires customization 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.
- **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, 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.
- **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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Can generate a paper check request for accounting. This requires configuration at no additional cost.
- **View Annual Scheduled Payments**: 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 addition 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.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information, but requires customization at additional cost.

Budgeting

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

- **Budget 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
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Splitting Grants Across Programs**: Can split grants across more than one program for budgeting and payment-tracking purposes, but requires customization at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires customization at additional cost.
- **What-Ifs**: Does not let you set up "what-if" scenarios.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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.

Roles and Permissions

- **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 which 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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.

- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize drop-down values for fields such as program or grant codes.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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.

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 an expert user is 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 8:30am to 5:00pm MT, as part of the yearly support and maintenance fee.
- **Manuals and Documentation**: The vendor provides manuals and documentation.
- **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.

WIZEHIVE Grant Manager

Wizehive's Grant Manager 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. Grant Manager scores well in grant tracking, online applications and email capabilities, and easily configurable grant review workflows bolster an already solid application review process. However, Grant Manager has minimal support for relationship management—it's difficult to associate multiple grants with a single organization, or multiple contacts with a single grant. A 501(c)(3) organization that needs only light online application and review functionality could potentially use Grant Manager free of charge. An organization that receives more than 500 applications annually, and more-robust donor management capabilities, might pay closer to $6,000 per year, plus setup fees ranging from $2,000 to $8,000.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: Grants and applications are only searchable by EIN, legal name, and appID. Searching by grant and program cycles depends on system setup; could be configured during intial consultation.
- **Handling Paper Applications**: Applications received in paper can be easily entered into the system by starting a new application.
- **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.

Online Applications

- **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 vendor.
- **Creating Multiple Application Forms**: Lets you create different online forms to support each grant program.
- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **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 setup 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.
- **Application Data 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.
- **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.
- **Viewing Status Online**: Applicants cannot view their status online, but the system can send them automatic emails to notify them of changes in status.
- **Custom Confirmation Messages**: Lets you customize confirmation messages 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.
- **Applicant 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.
- **Applicant Previews**: Applicants can easily view or print applications at any stage in the process, but it first has to be saved as a draft.
- **Preview Packet**: The applicant can create a preview packet of their grant which includes either copies of all uploaded documents, or links to them.

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.
- **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 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.

- **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-Merging Fields**: 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.
- **Invididual Letter Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to board docket.

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.
- **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.

Relationship Management

- **Tracking Grant 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**: Does not easily let you track individual business units under a larger organization.
- **Tracking Multiple Contacts**: Lets you associate just one contact for each grant application.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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.
- **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**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Reports**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

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.
- **Paper Check Requests**: Cannot easily generate paper check requests.
- **View Annual Scheduled Payments**: 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. You can export information to a .csv for for import into an accounting package.
- **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.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year, but requires customization at additional cost.
- **Splitting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: 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.
- **Hierarchical Summaries**: 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 accomodated 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**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.

Roles and Permissions

- **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—on 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 which 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**: Does not provide a focused, roles-based view for management and board members.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 broswer.
- **Grant Information 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 broswer.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant codes.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Lets you customize field names.
- **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 permits extensively customized systems to remain on the upgrade path.

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.
- **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 an expert user is 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.
- **Manuals and Documentation**: Documention is provided online in pdf and video format
- **Training**: Vendor provides initial training for users and judges (onsite 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. WizeHive has been in use by clients since 2008.
- **Client Base**: The vendor reports that they have about 150 clients. Breakdown by foundation type is 67 percent private, 10 percent family, 13 percent corporate and 10 percent government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

ZOOMGRANTS 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. Only applicants, not foundation staff, can make changes to organizational information. Search functionality is basic; ZoomGrants outputs information to an on-screen 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 Standard. Each additional grantmaking program adds $1,495 annually. ZoomGrants Pro, required to access all the functionality covered in this review, requires an additional $2,495 annual subscription fee.

Internal Tracking

- **Linking Grant Information**: 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 Cycles**: Can track by program cycle or board meeting date.
- **Tracking by Categories**: Can track by categories, such as geographic or population-based codes.
- **Custom Categories**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Grant Information**: Only the grantee can update basic grant information like project names or codes.
- **Attaching Files to Grants**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs.
- **Searching Grants**: There is no traditional search functionality. The system has a "rolodex" feature that lists all contacts and organizations in the system in an on-screen report. From here you have to use your browser's search functionality to locate the information you want.
- **Handling Paper Applications**: Applications 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.

Online Applications

- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, checkboxes and text fields without additional charges from vendor. Radio buttons are used in lieu of dropdown fields.
- **Creating Multiple Application Forms**: Only supports one online application form per RFP, but multiple RFPs can be run simultaneously
- **Look and Feel**: Does not let you customize the colors, fonts, or navigation of your online application forms to match the look and feel of your website.
- **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**: The system supports two application stages, including an eligibily quiz and a main application stage.

- **Application Data 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.
- **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.
- **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't be customized. Additional messages can be sent using saved message templates but these must be sent manually.
- **Application Formatting**: Does not allow applications to be formatted using rich text, grouped 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 you move between fields.
- **Applicant 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.
- **Applicant Previews**: 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.

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.
- **Reviewer's Portal (changed "stripped down" to "simplified"**: Users in the reviewers group are shown an appropriately limited interface.
- **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 potentials 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**: 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**: 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-Merging Fields**: 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.
- **Invididual Letter Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Does not let you attach documents the board docket.

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.
- **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.

Relationship Management

- **Tracking Grant 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.
- **Tracking Multiple Contacts**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **System Generated Communications Log**: Stores a record of all system-generated email for each grant, but not other communications.
- **Outside 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.
- **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**: Cannot automatically email grantees to remind them about upcoming deadlines. Reminders must be sent manually by the administrator.
- **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 Reports**: 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.

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.
- **Paper Check Requests**: Cannot generate paper check requests.
- **View Annual Scheduled Payments**: 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**: 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 U.S. dollars.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **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, but only the admin role can change payment information.

Budgeting

- **Budgeting Method**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget 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.
- **Copying Budgets**: Lets you use previous years' budgets as a base and adjust them for current year
- **Spliting Grants Across Programs**: 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.

System Querying and Reporting

- **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**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Does not let 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.
- **Hierachical Summaries**: 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.

Roles and Permissions

- **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 three roles: Admin, reviewer and applicant.
- **Field-Level Permissions**: It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides three different internal interfaces—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**: 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.
- **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.
- **Rule-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 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.

Overall Customization

- **Dropdown Fields**: Radio buttons are used in lieu of dropdown fields. These values are customizable.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Field Names**: Some field names can be customized but not all.
- **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.

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 to 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.
- **Manuals and Documentation**: The vendor provides manuals and documentation. Help slide shows are available for each of the three system roles.
- **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% government and 20% various private foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

APPENDICES

APPENDIX A: RESEARCH METHODOLOGY

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, as well as a list compiled by Martin Schneiderman of Information Age Associates.

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. This report focuses 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. Based on responses to our questionnaire, one product did not meet our eligibility criteria for this report, and two vendors declined to participate (one because their product is not generally offered without their consulting services). Another vendor did not respond to our attempts to contact them for this report.

Through this process, we rounded out our final roster of 20 systems which were reviewed in July and August. Two additional vendors contacted us after the release of the report in September and were reviewed for an addendum.

Evaluation Criteria

We started with the criteria used for our 2008 grants management report, then solicited feedback on these criteria from six experts in the grants management field. This process resulted in the addition of 37 new criteria to use when evaluating the grants management systems in this updated edition of our report.

In July and August 2011, Idealware conducted detailed software demos of 20 grants management packages. These packages were evaluated against the revised set of criteria—more than 130 of them. Two additional packages — Ocean Peak Common Grant Application and ZoomGrants—were added after the initial publication of this report and were reviewed in December 2011. The results of all 22 reviews can be found in Appendix A.

The scores in our features comparison are based on a rubric derived from the evaluation criteria. This rubric is, in turn, based on the one we used in the first edition of this report, with some changes that reflect both the addition of the new criteria and the current state of field of grants management systems. To view the rubric used to score the systems, see Appendix B.

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 weaknesses 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 on criteria quite differently than we did, this rating system can provide a starting point for comparison.

None / Not Acceptable	Basic	Solid	Advanced
Internal Tracking			
• Does not meet the criteria for **Basic**.	• 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	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.	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.

None / Not Acceptable	Basic	Solid	Advanced
Online Applications			
• Does not meet the criteria for **Basic**.	• Lets you collect application information online and view it. • Can include custom drop-downs and text fields in applications. • Lets applicants upload files as part of their application.	Meets **Basic** criteria, plus: • Can include file uploads, drop-downs, checkboxes, and text fields in application fields. • Lets you customize online application forms with your logo, at a minimum OR applicants can easily copy either an entire existing applictaion or reuse previous responses. • Supports an application stage for a Letter Of Intent and one for a more detailed proposal. • Lets applicants view their status online. • Lets applicants save their application and return. • Supports multiple logins for grantees on a single application OR Grant application forms can branch at all stages, possibly through customization.	Meets **Solid** criteria, plus: • Lets you create new online applications without additional charges from vendor. • 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. Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required. • Carries over some data for an organization or grant from one application form to another—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal. • Both applicant and grantmaker can quickly and easily reset lost credentials. • Lets you customize a confirmation message to be sent upon submission of an application.

None / Not Acceptable	Basic	Solid	Advanced
Application Review			
• Does not meet the criteria for **Basic**.	• Supports at least a single review comment and rating for each application.	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. • Lets reviewers easily print grant summaries. • Lets multiple reviewers each rate an application, with at least one comment and one numeric grade for each application. • Provides a stripped down "portal" interface to allow reviewers to see and review grant applications without navigating the full grants management interface. • 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 and potential conflicts of interest 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. • Proposal owner and management staff can be automatically notified when reviews are completed; OR • Lets you define automatic steps and rules, or "workflow," for the grants review process

None / Not Acceptable	Basic	Solid	Advanced
501(c)(3) & OFAC Status			
• 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: • EITHER Provides a format to allow you to check organizations against a standard OFAC list OR Automatically checks EIN numbers against a standard registry and flags those not listed.	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.
Letters & Board Dockets			
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 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.

None / Not Acceptable	Basic	Solid	Advanced
E-mails			
• Does not meet the criteria for **Basic**.	• Lets you send e-mail through the system to a single individual.	Meets **Basic** criteria, plus: • Lets you send e-mail through the system to a single individual or a group of people who meet particular criteria. • 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 e-mail 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 • Delivery reporting/ attachments.
Relationship Management			
• 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 e-mails with a particular contact, OR a grantee organization. • 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 e-mails for each grant. • Lets you keep a log of communications such as phone calls and e-mails with a particular contact at a grantee organization. • Can track individual business units under a larger organization • System allows you to automatically synchronize contacts with Outlook; OR • System allows you to automatically export system contacts to Outlook or Exchange; OR • Lets you automatically capture emails from external email systems into grantee or organization records.

None / Not Acceptable	Basic	Solid	Advanced
Grant Requirements & Evaluation			
• 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.	Meets **Solid** criteria, plus: • Lets you define a default set of grant requirements and customize them for individual grantees. • Lets grantees view grant requirement deadlines online. • Can automatically e-mail grantees to remind them about upcoming deadlines. • 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.

None / Not Acceptable	Basic	Solid	Advanced
Payments			
• 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). • Supports grants in a single currency; OR • Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.	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/security controls to ensure that only certain staff can change payment information. • Supports an automated payment approval process with configurable workflow steps.

None / Not Acceptable	Basic	Solid	Advanced
Budgeting			
• Does not meet the criteria for **Basic**.	• Let 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.	Meets **Solid** criteria, plus: • Lets administrators view the impact a particular grant will have on future year payouts with a "what-if" type feature. • Can track budgets in hierarchically defined categories or program areas.
Reporting			
• 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.	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. • Lets you quickly view favorite reports 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.

None / Not Acceptable	Basic	Solid	Advanced
Roles & Permissions			
• 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			
• 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 way that they 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 way that they 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 drop-down 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.
Ease of Use			
• Does not meet the criteria for **Basic**.	• Most individuals could learn how to use the system with training.	Meets **Basic** criteria, plus: • The user can easily find the actions he or she is 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. • The user can easily find the actions he or she is 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 e-mail 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.
Stability in the Market			
• 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.

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.

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The Grants Managers Network improves 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. Visit www.gmnetwork to learn more or join the Grants Managers Network.