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A Consumers Guide to Grants Management Systems

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INTRODUCTION

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

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 under $3,000 a year, while a specialty solution for a very large grantmaking organization can cost upward of $200,000 per year.

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 lifecycles, take a look at what grants management systems do, and compare the strengths and weaknesses of the packages available for U.S.-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. Systems that only address a portion of the grantmaking process or are targeted to other types of grantmakers were not included in this report.

Community foundations differ from private foundations in several important areas (including unique functionality such as fund development, full fund accounting, or donor portals) that fall outside the scope of this report. However, a few of the systems reviewed here do also address the needs of community foundations. (To learn more about how the needs of community foundations differ from those of private or corporate grantmakers, download the January 2012 *Consumers Guide to Integrated Software for Community Foundations* for free at http://www.idealware.org/reports/community-foundations.)

This report focuses on systems that help private foundations manage their grantmaking process through the entire grants lifecycle.

We also did not include systems specifically designed to help grant recipients manage proposal submissions and grants they've received. A few systems included in this report—such as Common Grant Application, PhilanTrack, and ZoomGrants—are designed to support both grantees and grantmakers, while some, like Fluxx, offer separate products to meet these needs.

What's Changed Since the Last Report?

We released the first edition of *A Consumers Guide to Grants Management Systems* in 2008, with subsequent major revisions in 2011 and 2013. A separate 2012 edition focused on grants management systems for community foundations. Since then, we've found that the field of systems has evolved substantially.

There's more of an emphasis on workflows to automate processes, and on integrating grants management systems with external sources of data and other systems used by foundations. Cloud-based systems now greatly outnumber those which must be installed on a local server, and there's a strong trend toward a more widely accessible user interface, with vendors embracing modern web design practices so that even casual users can quickly find the data they need.

Overall we see a marketplace that is evolving. Some historically well-established major players, such as MicroEdge's GIFTS, continue to support existing clients, but are no longer widely-available. Relatively younger companies—including Fluxx, Foundant, and FluidReview—have grown their client bases significantly. Since 2013, some longstanding providers have consolidated (such as Altum acquiring PhilanTech) while others have seen investment from outside the grantmaking space. Most notably, Blackbaud acquired MicroEdge in 2014.

Some vendors are exiting the private foundation market altogether. Good Done Great, which supports a diverse client base of private, family, and community foundations, has moved into the Corporate Social Responsibility (CSR) market, and now works exclusively with corporate foundations. Many longstanding solutions have seen their client bases remain the same or decline since our 2013 report. In coming years we predict more generalized grants management vendors will begin seeking under-served niche markets or exit the marketplace altogether.

Cloud-based systems now greatly outnumber those which must be installed on a local server, and there's a strong trend toward a more widely accessible user interface.

What's New in Our Methodology?

In this edition of the report, we've expanded our criteria to reflect the sector's growing interest in measuring the impact of each grant, which allows us to better understand how each system can aid foundations in evaluating their grantees' outcomes.

Grants Management System Vendor Roadmap

Finally, this year we're also publishing a supplement called the *Grants Management System Vendor Product Roadmap*, in which vendors are invited to share their plans for the systems reviewed in this report. We'll work with those vendors who choose to participate to update the supplement three more times in six-month intervals as a way to keep you up to date on product changes between editions of the *Consumers Guide*. If you signed up to download this report, we'll email you each time the *Vendor Product Roadmap* is updated.

HOW TO USE THIS REPORT

This report is not meant to be read cover-to-cover. The first section, *Considering Grants Management Systems*, highlights the features and functionality you can expect to see in this type of software as well as considerations for selecting and implementing a new system. If you're implementing a grants management system for the first time, these pages will provide context about the types of solutions available as well as an explanation of some of the terms you'll see throughout. If you're looking to replace your organization's existing system, you'll learn how the market has changed, including functionality that may be new since you last compared options.

The second section, *Comparing Grants Management Systems*, takes a closer look at the specific systems reviewed for this report. Each will excel for some foundations but fall short for others, and there is wide variety among the systems we reviewed. We've grouped them into six categories based on cost, functionality, and specific use cases:

- Low-Cost for Simple Needs
- Flexible Relationship Management
- Complex Online Data Collection
- Complex Application Review Needs
- Strong Outcomes Measurement and Reporting
- Substantial Functionality for the Needs of Large Foundations

If you already know that your organization's needs match one of these use cases, that section can help you start defining a short list of solutions. For each we've provided descriptions highlighting the pros and cons, particular audiences or use cases, and pricing estimates to help you get an idea of how it fits into the overall marketplace.

We've also provided an easy-to-read chart for each category to allow you to see at a glance how each system rates across high-level functionality, as well as quickly compare the systems on your shortlist by cost and functionality. (For more information about the framework we used to determine the ratings, see *Appendix B: How We Rated the Systems.*)

These criteria are not intended to be a list of what every system should be expected to provide.

Once you've identified a shortlist of systems you think might meet your foundation's needs, you can view the full review for each in the third section, *Reviews of the Grants Management Systems*. We include detailed descriptions of how each system compared when we evaluated them against the list of 174 requirements during vendor product demonstrations. We selected these criteria through interviews and conversations with foundation staff, consultants, the vendors themselves, and grants management experts to provide a well-rounded view of what we expect grants management systems as a whole could provide.

Note that these criteria are not intended to be a list of what every system should be expected to provide.

Different products approach the needs of foundations in different ways, and vendors have different philosophies about how to approach these needs. Some systems were developed for particular niches of the sector, while others play to their strengths and are designed to be used in tandem with separate, third-party solutions.

As with all technology decisions, you should start by talking to the staff members who will be using the new system. What do they like about your current solution? What functionality is missing? What would they want from a new system? What are must-have features and what are nice-to-have features?

Once you've identified your shortlist, talk to other foundations already using those systems to learn what they like or don't like about them. Remember, this report can only tell you what is available to meet your needs, but you'll have to do the work to define those needs.

CONSIDERING GRANTS MANAGEMENT SYSTEMS

DO YOU NEED A GRANTS MANAGEMENT SYSTEM?

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

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

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

If you're considering shifting your processes online, a grants management system can provide both online and grant-tracking functionality in a single package.

WHAT TYPES OF SYSTEMS ARE AVAILABLE?

As you start to consider your options, think through what types of systems might work for you before considering specific systems: online hosted or installed; integrated with back office services; specialized for community foundations; or custom-built.

As you start to consider your options, think through what types of packages might work for you before considering specific systems.

Online Hosted Systems

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

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

The online systems currently available typically offer strong support for online data collection, including online applications, review processes, and progress reports. They range from straightforward, inexpensive packages starting at under $3,000 per year all the way up to very sophisticated, customized systems for more than $200,000 per year.

Installed Systems

A more traditional option, installed systems are purchased upfront 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 few installed systems still available tend to be strong in the kinds of features that can help your staff manage a complex process—such as the ability to code grants with keywords and easily create printed letters—but can be weaker in online data collection. Some require external modules to support online applications and progress reports, or to let you send email from within the system. They typically cost more in the first year than the online systems, ranging

from under $3,000 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 in which you purchase and install their software on your own web server. As with an online hosted system, your staff can then access it from anywhere there's an Internet connection, and it easily supports online data collection. It also provides more control over technical details than a hosted system. However, you'll need to purchase the hardware required to host the system, and you'll need qualified IT staff to install and update the software and back up the data. You'll also need to ensure that the system is hosted securely and reliably.

Systems Integrated with Back Office Services

A few companies provide online grants management systems as part of a much larger service offering that includes staff support for a full range of back office services, such as payment processing, mailings, accounting, and tax preparation. One of the products reviewed in this report is available as part of such a package—it meets our eligibility requirements for inclusion since it is also available as a standalone 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 complex fund accounting (including donor-advised funds), donor portals, or other functionality unique to community foundation systems.

However, we've included two systems in this report that either specialize in or exclusively serve community foundations: Smalldog, from Smalldog Net Solutions, and Fusion Labs' Granted GE/Spectrum, both of which meet our eligibility criteria for grants management systems. Additionally, Bromelkamp's First Pearl and First Akoya.net are also available in versions tailored to the needs of community foundations, and several systems in this report are also used by a significant number of community foundations. (For more information about the needs of community foundations and systems designed for them, see Idealware's January 2012 *Consumers Guide to Integrated Software for Community Foundations*. You can download that report for free at http://www.idealware.org/reports/community-foundations.)

Custom-Built Systems

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

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

WHAT DO GRANTS MANAGEMENT SYSTEMS DO?

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

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

Internal Tracking

At its simplest, a grants management system needs to do two things: store basic information about grant proposals so you can easily retrieve it (for example, name, sponsor, contact, and purpose) and track the proposal's status as it moves through your process. Useful additional features include the ability to upload documents, such as financials, 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 proposal information to be entered by grantees and make it difficult or impossible for grantmakers to change proposal names, update contacts, or upload documents themselves. Some even require grantmakers to log in as grantees, which is an awkward step.

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.

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

There is renewed interest in the grantmaking community in a common vocabulary, or in more technical terms, a shared taxonomy for the sector that is implemented in grants management systems. We asked vendors about their willingness to support this strategy, too. The taxonomy most widely supported by the systems we reviewed is the NTEE System used by the IRS and the National Center for Charitable Statistics. Some systems also support the categories used by the Foundation Center, but most expect clients to build out these codes themselves.

Online Applications

Grantmakers are increasingly accepting grant proposals online, but grants management software varies widely in its support for online applications. Some systems barely support them at all, while others are built around them. When implemented thoughtfully, online applications can be an opportunity to streamline the application process for both grantmakers and grantseekers by eliminating the need to manage paper proposals, ensuring all required information is complete upon submission, and automating compliance checks and communications.

Systems also can streamline the application process by limiting the information provided by applicants until they are determined to be strong candidates for funding. Some systems include an interactive qualifying round, sometimes called an eligibility quiz, in which applicants answer a few questions to determine whether they're eligible for funding before taking the time to complete a more lengthy application.

Most allow at least a two-stage process that supports both an initial Letter of Intent and a more detailed proposal. If your application process contains multiple stages, check to see if the software will roll information from one stage to the next so grantees don't have to re-enter data as they move through the different stages. Most systems also allow applicants to avoid redundant data entry by letting them reuse information from one application to the next. Some systems support branching capabilities in online forms to collect different information from applicants based on the information they provide.

It's critical to consider the experience of filling out application forms from the perspective of the grantseeker. For example, online forms can "time out" unexpectedly, losing all of the grantseeker's work. Some systems mitigate this by automatically saving online form entries at regular intervals. A few simply warn users to save, while many others present a save button and rely on user diligence to make sure they don't lose any work. Applicants should also be able to save incomplete applications and return to them. Most online application schemes let you use browser-based spell-checking to proof your work, but a few packages include built-in spell-checkers.

It's critical to consider the experience of filling out application forms from the perspective of the grantseeker.

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

Most systems will allow applicants to upload attachments, in some cases including video or audio files—check if the file formats you need are supported and that virus scans for such uploads conform to your foundation's specifications.

Once applications are submitted, applicants should receive confirmation emails. Some systems let you customize the text of that email. Check to make sure application data flows seamlessly into the grantmaker interface—if not, you'll have to take the time to do manual data transfers.

You might also want the ability to collaborate with applicants on applications in progress, and provide comments and feedback before the applications are even submitted—some systems will let you do so. Some allow applicants to check the status of their requests online as they move through the review process, reducing or eliminating the need for grantseekers to call for updates. A few systems have even streamlined the online application process so that applicants can log in and see all proposals in progress with any funders who happen to use the grants management system to manage their processes rather than having to register multiple accounts.

There are emerging opportunities to connect grants management systems to third party data sources to further streamline the application process. One example of this evolution is the Simplify Initiative, a collaboration between GuideStar and TAG, which eliminates duplicate data entry for grantseekers by transferring the data in their GuideStar profile to the grants management systems of the potential funder. While several of the vendors in this report already support Simplify data out-of-the-box, most have not yet adopted this initiative, citing a lack of customer interest. A small number of systems have built in more limited functionality focused on automating charity status checks that pulls data directly from the IRS Business Master File.

Form Design and Flexibility

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

Make sure it's easy for application reviewers to view all the information necessary to consider an application.

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

Application Review

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

Make sure it's easy for application reviewers to view all the information necessary to consider an application. For example, does the system let them see whether you've previously awarded any grants to the applicant? It can also be useful to provide reviewers a stripped-down version of the system so they don't have to wade through every detail of an application to read the relevant information and add their comments. If it's important for your reviewers to view paper versions of applications (in a board meeting, for example), can you easily print a summary, or only a (lengthy and wasteful) document with every field and attachment in the proposal?

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

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

501(c)(3) and OFAC Status

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

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

Grantmakers often need to create not only printed letters, but also board dockets that allow board members to review all proposals under consideration.

Creating Letters and Board Dockets

Grants management processes can be document-heavy. Grantmakers often need to create not only printed letters, but also board dockets that allow board members to review all 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. As board dockets can be very lengthy documents spanning hundreds of pages, consider looking into what options the system provides for viewing these files electronically. Few systems will provide specific formats for viewing and annotat-

ing board dockets from tablet devices, but almost all will allow you to at least save generated documents as a PDF file in the same format as print templates. Worth noting is that an entire separate class of software exists to enable the creation and viewing of electronic board documents—these board portal tools provide more functionality for comments and annotations on the docket than a standard .PDF and are designed specifically with tablets and other mobile devices in mind. (For more information about board portal software, see Idealware's *A Consumers Guide to Board Portals*. You can download that report for free at http://www.idealware.org/reports/consumers-guide-board-portals.)

Email

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

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

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

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

Most grants management systems support email in some form.

In general, we recommend 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. We also recommend steering clear of systems that send out group emails via blind copy rather than one-to-one—that's another spam trigger.

Relationship Management

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

To do this effectively, a system must track organizations separately from individual grants—to allow you, for example, to see what conversations you had about a previous grant when a new one is under review. It can also be helpful to track the names and roles of individual staff members at a grantee organization.

This is particularly important for large institutions such as universities, where different researchers may apply separately for grants.

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

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

Grant Requirements & Outcomes Evaluation

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

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

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

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

The nonprofit sector as a whole has witnessed greater demand for measuring the effect individual programs are making in the lives of their participants.

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. Some systems let you customize them yourself. Others require you to pay the vendor for each change. Will it let you use the collected data in summary reports?

In the past few years, the nonprofit sector as a whole has witnessed greater demand for measuring the effect individual programs are making in the lives of their participants and the community as a whole. We asked the vendors to demonstrate how each system can support the work of foundations trying to measure the impact their grants have on their target demographics or toward their stated objectives.

While outcomes management has different goals than regular post-award progress reports, overall the grants management systems use the same workflow and functionality (like online forms and custom reports)

to meet both needs. Most systems are able to roughly support this through custom fields and ad-hoc reporting, without much attention or development paid to the strategies or research behind program evaluation. However, several products in this report provide modules or tools dedicated to this need, although each does so in slightly differing ways.

Many systems store wire transfer information and can facilitate electronic grant payments.

Because of the variety of ways systems approach outcomes, it's important to think carefully about what your foundation wants to measure and the particular strategy you want to (or already) use. If you want to simply measure grantee progress against a few stated objectives for your programs (for example, if a particular percentage of populations served must be veterans or children), most systems will likely meet your needs. However, if you hope to compare your grantees' results against national benchmarks, or want to measure the total effect of a grant on a population (as opposed to what changes would have happened without intervention), you will likely need a considerably more complex solution.

Payments

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

In many software packages, setting up a payment schedule for a grant mimics the process of setting up grant requirements. Some require you to schedule each payment manually, or automatically default to paying the entire grant in a single lump sum on the established grant start date. Others allow you to set one or more default payment schedules, which you can then assign to a grant—for example, to say that every grant within a particular program is a three-year grant with a payment on the first of each year. Some systems also offer a payment scheduling "wizard" to distribute payments over time. However you initially define payment schedules, it's useful to be able to then manually adjust them to specific circumstances for a particular grant. If your foundation makes program-related investments (PRIs), think about how the system will let you schedule out repayments. Will it generate them automatically based on the amount and duration? Or will you need to manually enter each expected payment (a daunting task when loan repayments may take three or four years)? Can the system calculate the interest for these repayments?

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

If your organization requires paper check requests for accounting, make sure the system supports them—some can even be configured to print checks directly from the system. Alternatively, consider more streamlined ways to generate grantee payments. Many systems store wire transfer information and can facilitate electronic grant payments. Whichever method you use, make sure you can store payment information, such as date paid, check number, and amount, within the grants management system itself,

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

where it's easily accessible. Can you void payments in the system, place them on hold, and track sophisticated transactions like quid pro quo and in-kind payments?

Many grants management systems integrate with external accounting systems like QuickBooks or 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.

As more systems allow for greater self-service for grantees, it's also worth considering whether you want payment schedules and associated conditions or requirements accessible from the grantee portal. If so, can grantees view just the installments they have already received in the system, or can they view all scheduled and received payments?

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

Budgeting

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

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

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

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

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 to monitor your workflow, evaluate your practices, and report on your activities—for example, the amount of money committed and paid for the year, sorted by program, or grant details required for a Form 990-PF (Return of Private Foundation). Such basic reports are con-

sidered standard, and most software packages provide for them out-of-the-box. The ability to customize these reports to better meet your needs and save those customizations for future use can save a lot of time and money, but not all systems allow this. Also, many of the systems that do provide standard reports and queries provide a lot of them. Is there some way to customize or filter the list to bookmark your preferred reports? A growing trend in the sector is opening up reporting access to casual users of the grants management system, not just experts. We evaluated the approachability of the reporting interface for the first time in this report. (For a list of the basic data you need to be able to get out of your system and more useful information, download GMN's free report, *Assessing the How of Grantmaking,* at http://www.gmnetwork.org/projectstreamline/articles-topic/evaluate-practices/assessing-grantmaking.)

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

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

Some of these tools are basic, and allow limited support for customizing reports. Others are limited only by your ability to apply them.

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

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

Permissions and Workflow

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

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

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

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

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

Data Access

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

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

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

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 does it let you write to the database? Some require the vendor 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 many web-based applications are accessible via smartphone web browsers, their screen size can make it impractical to use them unless the vendor either provides a view optimized for mobile browsers or builds a compact smartphone application, or "app," to facilitate access. Using a web-based grants management system from tablet computers can be practical without a specialized app or mobile view given their larger screen size relative to smartphones. Mobile device access is still new territory so it pays to get detailed information from the vendor if this is something that interests you.

Most of the web-based systems we reviewed have eschewed mobile apps in favor of "responsive" web design, which will automatically rearrange fields, forms, and sections of the user interface to match the size of each user's screen. While this provides a convenient means of viewing grant records from a smartphone or tablet, it may not provide the ideal environment for filling out forms or answering questions with radio buttons or checkboxes. As a result, if it's important to you that reviewers can easily rate grant applications from mobile devices, look for systems that can provide a dedicated mobile interface for those use cases.

We also asked about ways in which vendors protect the security and integrity of your data within the system.

Overall Customization

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

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

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

Most grants management systems are designed to appeal to the broadest spectrum of users possible.

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

Ease of Use

All grants management systems are fairly complex, so your staff is likely to require training. However, functionality should be relatively easily to learn and to remember. Are fields and functions intuitively named and easy to find? If staff need cheat sheets or guesswork to run basic processes, they're more likely to opt out of using the system, or to resort to workarounds.

Can users easily find the actions they need to take without returning to a main menu? The system should also effectively support power users—those most familiar with the system. Can your grant administrator perform common tasks quickly and efficiently?

Support and Training

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

In terms of phone support, the difference is likely to be on price and quality. How much do you have to pay, either per incident or per year? Are existing customers typically able to reach someone knowledgeable when they call for support? Online support is also increasingly common, including videos, FAQs, chat support, and other web-based support for technical issues.

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

Different vendors provide different types of training, from affordable over-the-phone and online options to more formal training at your own offices. Ask the vendor whether they have training materials and how much you will pay.

Installation and Maintenance

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

Stability in the Market

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

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

Specialized Needs

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

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

WHAT DO THESE SYSTEMS COST?

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

- **Yearly fees**. Most hosted systems charge an annual fee that is often scaled to usage. It's likely to be based on some combination of the total 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.
- **License and maintenance fees**. Rather than an annual fee, most installed software packages charge a per-user up-front fee for purchase and installation—anything from a few thousand to hundreds of thousands of dollars. Many also offer an à-la-carte menu of optional modules that can substantially affect the license cost. In addition, there's typically an annual "maintenance" fee, generally 15 percent to 20 percent, which covers phone support and software updates—this fee is more common with installed solutions, but a few of the hosted systems in this report price support separately from the annual licensing costs. The maintenance fee is often optional, but skip it at your own risk—phone support is important, and without updates your software will become out-of-sync with the vendor's latest version, making it difficult (and likely expensive) to purchase add-on modules in the future.
- **Setup and configuration costs**. Most vendors charge setup and configuration fees—this is true of both hosted and installed systems. Some vendors' pricing structures are simple, charging specific fees for analyzing and documenting your system requirements, customization, online application building, report creation, and data migration. A few cover all these services in the base pricing structure. Others use complicated pricing models 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, hosted systems cost less up front than similar installed systems, but are more expensive in terms of ongoing vendor fees.

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

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

COMPARING GRANTS MANAGEMENT SYSTEMS

THE STATE OF THE GRANTS MANAGEMENT SYSTEM MARKETPLACE

How do the available packages compare? Below, you'll find summaries and comparison charts. We also took a careful look at 29 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.

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 vendor has made significant improvements around creating and formatting applications, and include a helpful, well-thought-out ability for applicants to reuse information. The system can support both grants to nonprofits and scholarships for individual applicants, and allows both individuals and organizations to apply to the same grant program. The vendor also reports being willing to customize the system at no cost to the client and roll out those changes to all users if the new functionality is deemed useful to the user community. On the other hand, much grantmaker functionality is notably absent, and relationship management is all but nonexistent, as is support for budgeting. Common Grant Application does not handle mail-merge fields for print or email correspondence. There is some ability to track payments, but no functionality to make payments contingent on a reporting requirement. The system now supports saving a list of favorite reports for easy access, and all visible system fields can be queried and included in both standard and ad-hoc reports—for instance, reports can be configured to include just text fields. Common Grant Application calculates its pricing partially by taking into account the number of applications received in a given year. For instance, a small foundation who receives only 10 applications annually could use Common Grant Application for around $1,270 per year, while a very large foundation with 100 applications a year could expect an annual fee of about $5,500. Ongoing support and training is included at no additional cost.

Foundant Grant Lifecycle Manager

Foundant Grant Lifecycle Manager is a polished, friendly, and quickly growing low-cost grants 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 doesn't support branching for applications or data collection. Recent improvements to payments and budgeting allow you to set budget amounts by program area and automatically generate a repayment schedule for program-related investments (PRIs). The system does not allow users to define their own user roles or integrate with third-party systems via an Application Programming Interface (API). It does, however, allow you to export most visible data from the system. Foundant is very reasonably priced, at $7,500 for a two-year license, which includes support, and $1,500 for a one-time setup cost.

GivingData

Originally developed as a business intelligence and analytics reporting tool to integrate with MicroEdge GIFTS, GivingData is a new entrant into the grants management market, launching as a full lifecycle GMS in January 2016. As a result of this pedigree, the system's reporting functionality is strong, with visual-

izations such as charts and graphs and the ability to drill down into report results for more detail. The reporting engine also supports other sections of system functionality, including budgeting. A dedicated assessment module provides support for tracking grantee progress toward program goals. Unlike other systems in this report, the evaluation functionality is designed to be used by foundation staff directly (e.g., to record observations from site visits, reports, and evaluations) for individual grantees. At this point, there is no ability for grantees to submit progress reports online, and foundation staff cannot currently view outcomes data in aggregate across all grantees, but the vendor reports that these features will be available as of Q2 of 2016. The relative infancy of GivingData is most apparent in the functionality not present at release—currently there is no support in the system for grantees to apply for grants through online application forms, and compared to other systems in the report, support for relationship management is minimal. Pricing for the system is an annual subscription fee based on the number of users, starting at $6,000 per year for the core grants management functionality for up to 10 users, with additional fees for the assessment module, technical support, and professional services related to implementation.

GrantsOnline™

Designed as the successor to CultureGrants Online™, WESTAF's GrantsOnline™ (GO for short) was built by grantmakers for use by the state arts association sector. In addition to traditional grants management functionality, GrantsOnline™ has some unusual features likely to be of interest to arts funders, such as built-in support for the National Endowment for the Arts reporting requirements, and the ability for applicants to submit videos in support of their applications. Conveniently, the videos stream rather than download, although files are converted to the Flash format, which isn't well supported on iOS devices like iPads. While generally strong in internal tracking, the system has a comparatively limited ability to track grants easily by categories and codes, and grantee data is organized by grant cycle, rather than by organization, so viewing a history of applications and grants across multiple years takes additional steps than in other systems. 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, and you cannot report on the dollar allocations by categories or codes. Pricing for GrantsOnline™ has three tiers and starts at $4,450 in annual license fees for five grant programs and up to 500 users with a first-year setup fee of $7,550. Additional media storage is available at additional cost.

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 $1,000.

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, and since we last reviewed the system, the vendor has added new global search functionality. PhilanTrack has also enhanced the online application form functionality (called "templates" in the system) to allow

users to create custom questions on new forms without involvement from the vendor, but the relationship-management facility is limited, with only basic support for tracking communications with grantees. For example, you can't store a log of emails generated in the system. And while the system can generate automatic emails based on a number of action-triggers, there's no way to easily define parent/child relationships for organizations in the system. PhilanTrack's pricing starts at $3,000 annually with another $3,000 in first-year setup costs.

PowerOFFICE

PowerOFFICE is a solid, well-rounded system with particularly strong features around relationship and contact management. Built on IBM Notes Domino, the system can be installed on your organization's server, or hosted on the vendor's servers. PowerOFFICE is fairly strong in both print and email communication, although delivery statistics for broadcast email are only available through customization by the vendor. The system provides relationship and contact management through the PowerPEOPLE module, which allows users to track all of the communications they've had with individuals and associate multiple contacts to organizations and grants. The online application process is straightforward—the vendor will create application forms for you, but applicants cannot save incomplete applications to finish later before submitting, and neither can they view or print submitted applications without customization. A small foundation that receives 100 applications or fewer annually could expect to pay about $1,560 per year for a hosted version of the system, plus a one-time setup fee for online applications starting at around $1,000, or a one-time cost of $4,000 to install the system on your own server, plus annual fees of $800 and the setup fee for online applications. For larger foundations which receive up to 1,000 applications annually, the system would be $3,000 per year hosted (plus setup fee), or $12,000 for installed (with an annual fee of $2,000).

Smalldog

Smalldog, by Smalldog Net Solutions, is both one of the youngest systems in this report, and one of the few that primarily serves community foundations. This hosted, online system boasts strong built-in accounting and payments functionality with support for donor-advised funds. However, it offers only basic support for online applications—you can create a different application for each grant opportunity, but you cannot change the fields and questions asked, or customize the look and feel to match your organization's website. Similarly, the review process for submitted applications is a simple, but straightforward, single stage of approval or denial. Uniquely in this space, Smalldog provides its own crowdfunding platform, where grantees can publicly post their project on the foundation's site and collect individual donations. Pricing for the system is a flat rate for all clients, with a $20,000 one-time fee for setup, initial training, and implementation, with an ongoing fee of $1,000 per month.

Submittable

Submittable is an easy-to-use and affordable solution for foundations to set up, track, and review online applications and other forms. Online forms can be extensively formatted with a variety of field types, and the resulting applications and grants can be easily coded and searched with a large number of user-defined labels. Submittable includes generally strong application review functionality, with a variety of scoring schemes and the ability to display average scores, but does not include any automated workflow. Lack of any payment tracking functionality and budget support will disappoint some organizations, as will significant limitations on system reporting. Submittable offers several annual subscription options for grantmakers, starting at $3,300 for up to 50 staff members and 1,500 submissions per year.

Wizehive Grants Management System

WizeHive's Grants Management System offers a combination of features and affordable pricing that will make this online hosted system an attractive option for smaller grantmakers. For larger or more complex organizations, WizeHive Grants Management System can be integrated with the newer Zengine platform, offering increased automation and flexibility along with extensibility and integrations. Grants Management System scores well in grant tracking and online

applications, and easily configurable grant review workflows bolster an already solid application review process. However, Grants Management System is less strong when it comes to creating letters or other print communications, as there is no mail merge functionality. Since we last reviewed the system, the vendor has improved the reporting functionality, adding the ability for users to save their personal custom reports and settings to an easily-accessible "favorites" list, and support for charts, graphs, and other visualizations based on report results. An organization with five users, 10 grants per year, and only light online application and review functionality could pay as little as $2,998 depending on the level of customization needed. An organization that receives more than 500 applications annually, and more-robust donor management capabilities, might pay closer to $7,000 per year. Additional granting programs are possible with an additional yearly fee.

ZoomGrants

ZoomGrants is a well-laid out, hosted grants management solution centered on requests for proposals (RFPs) and the grant applications submitted in response to RFPs. Grant applications support an eligibility quiz in addition to the application itself, and can include fields for post-grant reporting. The system has robust support for the application process—applicants can manage their proposals and information for all funders using the system using one account, and can carry over contact information and other data from one application to another, or from a Letter Of Intent to a proposal. Only applicants, not foundation staff, can make changes to organizational information. Since the last time we reviewed this system, the vendor has added a global search functionality, and the ability for reviewers to report if they have a conflict of interest in reviewing a particular application, but there is no ability to use that information to match reviewers to applications. Merge fields are supported for emails, and you can schedule payments for individual grantees, but you cannot define a default payment schedule that applies to all awards. Pricing for the system is based on the number of grant or scholarship programs per year, starting at $4,500 per year for one program, including support, unlimited users, and unlimited applications, plus a one-time activation fee of $500. Each additional grantmaking program adds $2,000 annually.

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.

First Akoya.net

First Akoya.net, Bromelkamp's online grants management system built on Microsoft's Dynamics CRM platform, provides solid mid-level functionality for a great price. The system leverages its Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, First Pearl, First 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's functionality. The outcomes module provides strong reporting on grantee progress, and grant requirements and progress report forms can be customized by giving program, but you'll need the Builder module, at extra cost, to create new forms without paying additional fees. The vendor is open to performing custom development at additional cost for clients who need it and there are Dynamics CRM and First Akoya.net APIs available for those who want to extend the system themselves. Initial setup fees start at $9,870 and $1,920 annually for the first user. Each additional user costs $870 per year.

Fluxx

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as "dashboards" containing frequently viewed information.

These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has added some new capabilities to let grantees manage their organization contacts in the system, the ability for new applicants to auto-fill their profile using GuideStar's Simplify Initiative, and support for grantees to manage all their grants for multiple funders in the system, through Grantseeker, a new standalone product. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Since the previous version of this report, the vendor now offers sophisticated reporting functionality for tracking outcomes data by grantee or program, although it's a standalone product called Impact Intelligence, which costs an additional $5,940 per year. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Pricing for the system is determined by multiple tiers, with differing levels of implementation and customization, starting at a flat fee of $5,940 per year for the Streamline tier for smaller organizations that do not require any custom build-out. Larger organizations, which require considerable build out, could pay up to $250,000 in the first year, with annual recurring costs starting at $50,000 per year.

foundationConnect

foundationConnect is an online hosted solution built on top of the Salesforce platform. The vendor, roundCorner, is a privately held for-profit company, but the platform was originally created by the grantseeking nonprofit NPower. The system capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers and management to see only the information relevant to them. Grantees and external reviewers log in through a separate-but-tightly-integrated portal built on Salesforce Communities. Users will want to visit the Salesforce AppExchange to add third-party add-ons—such as Conga Composer or LOOP Document Services—for mail-merge and template capability. Email sent from foundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but is limited to 1,000 emails per day, and users can easily attach emails generated outside the system to a grantee's record. Many broadcast email programs, such as Vertical Response and Team Approach, also integrate tightly with Salesforce, while a free connector lets users log email sent from Outlook and synchronizes their contacts with the system. roundCorner, Inc. acquired the foundationConnect product and their team of experts from NPower in 2014. The initial setup cost for foundationConnect ranges from $25,000 for small foundations to $40,000 for larger foundations, with maintenance and support ranging from $7,200 to $14,400 and up per year. The Salesforce license is free for nonprofits for up to 10 user licenses, and costs $432 per license per year on top of that.

GIFTS Online

Acquired by Blackbaud in 2014, GIFTS Online is a fully web-accessible, online hosted entry into the grants management arena that offers many of the strengths of MicroEdge's legacy installed products GIFTS and GIFTS Alta. It's fully loaded with optional modules, and its strong suits are tracking grant information, mail merging, and application review. Since we last saw the system, the vendor has added new modules with support for tracking grantee outcomes and scholarships. GIFTS Online can offer customized views per user and per role, including customizable user dashboards and online forms. The vendor offers tiered pricing for the system, based on the number of users and modules—an entry-level client could acquire GIFTS Online for about $3,900 per year, while a very large foundation could expect to pay around $42,477 per year.

SmartSimple GMS360°

SmartSimple's GMS360° is a flexible, easy-to-use system—qualities that have been enhanced in recent updates with new global search functionality. 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. New functionality allows users to create multiple versions of the same form and display different versions to different applicants automatically through conditional logic. Uploaded files can be version-controlled and indexed, making their contents available to queries and reports. The system provides useful support for managing relationships, broadcast email, mail-merged letters, and reporting, as well as integrated task lists and dashboards to manage each user's work. Payment functionality and Budgeting are particularly strong, with support for payment workflows, multiple currencies, and interest repayment schedules for program-related investments. SmartSimple implementation starts at about $15,000, depending on number of programs and complexity of grant workflows and processes. Annual support and maintenance are included in monthly user fees. "High usage" staffers, such as grants administrators and program officers who use the system more than forty hours a month, are billed at $1,176 per user per year (billed on a monthly basis). "Low usage" staffers who are logged into the system for less than forty hours per month are billed at $192 per year (again on a monthly basis), and there is no charge for users who use the system less than two hours a month. External users, like reviewers or board members, are billed annually at $2,400 total (on a monthly basis). License fees are based on actual usage and the system automatically audits the user type for fair billing.

Zengine Grants Management

Zengine is a hosted, online system by the makers of WizeHive Grants Management System that provides a flexible platform for managing grants on its own or integrated with WizeHive's original product. Zengine provides strong support for tracking grantee history (or that of other constituents), with the ability to track chapters of larger networks of organizations in separate, but related records, and to set rules for which contact at an organization should receive which types of communications—for example, to send payment letters to the designated payment contact. Emails can be set up to send automatically by specific events or at a scheduled date and time, but this requires a third-party plug-in. The reporting engine is straightforward and easy to use, and provides a good selection of options for creating charts, graphs, or other visualizations, and support for online applications is solid. Pricing for the system is dependent on the level of customization needed, but starts at an annual subscription of around $3,000 for a single grant program, including support and basic training.

Complex Online Data Collection

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

DonationXchange

This hosted, online system, specializing primarily in corporate and private foundations, provides well-rounded functionality. DonationXchange has solid application review features and online application forms are flexible, with the option to embed the forms directly in a webpage. Budgeting in the system is mostly solid. A smaller foundation with five users dealing with fewer than 100 grants a year could get up and running in the system for about $10,000; larger foundations dealing with 100 grants or more per year and ten concurrent users could expect to pay $40,000 or more in the first year.

Good Done Great Grant Management System

Good Done Great Grant Management System (GDG) has undergone significant changes in the past couple of years, including a new focus on Corporate Social Responsibility (CSR) and corporate philanthropy clients. It remains an affordable hosted solution with strong functionality. Online forms built in Grant Management System can be matched to the look and feel of an organization's website. Facilitated by an intuitive navigation scheme, information collected online can easily be managed, viewed, and

reported on by grants administrators. Letter and email templates can be custom-formatted to organizational standards, and can contain mail-merge fields, which helps with large mailings. Improvements include support for multiple currencies and email delivery statistics. Major developments since we last reviewed this system in 2013 include the ability for grantees to apply to multiple different funders on the system using a single, unified account that is automatically verified against the IRS and OFAC databases. The vendor has also made considerable updates to improve functionality for online forms. A small foundation would pay about $10,000 for implementation of the system and about $11,800 each year, which includes basic training. A larger foundation would pay around $28,500 for implementation, and $42,870 each year, which would include custom, on-site training.

proposalCENTRAL

Altum's 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 reviewed. Lack of budgeting support and weak mail-merge facility for printed letters, however, may make it less appealing to some organizations. A technical feel and suboptimal layout make the system harder to learn than many others. Since we last reviewed proposalCENTRAL, the vendor has added a new reporting engine, which supports visual data representations such as charts or graphs, but requires a separate login from the rest of the system. Pricing can start as low as $5,000 per year for very small foundations that require less configuration. A foundation with five users and a single grant program can expect to pay $10,000 per year. Very large foundations with complex processes and substantial configuration needs may pay $55,000 up through $100,000 per year.

Versaic Grants

The Versaic platform is used by a number of corporate philanthropic departments to manage grantmaking, product donations, and sponsorships. Versaic Grants is a highly flexible platform built on Microsoft's .NET business application framework, and the vendor provides consulting services for clients including configuration of online forms, batch updates, and ongoing tech support for applicants and grantees. Reporting is very strong in the system and it has powerful internal workflows that can help segment applications based on programs and automatically route them to the right staffers. Since the last time Idealware reviewed this system, the vendor has added support for automatically checking 501(c)(3) and OFAC status though GuideStar's CharityCheck, but you cannot see email delivery statistics for system-generated email sent through the vendor's servers. The Versaic Grants solution can be implemented for $10,000 and up, with subscription fees of $15,000 and up per year for small foundations. For larger foundations, the vendor quoted a minimum implementation cost of $20,000, with annual subscription fees starting at $40,000.

Also consider First Akoya.net, foundationConnect, and SmartSimple GMS360°, listed above in "Flexible Relationship Management," or PhilanTrack and WizeHive Grants Management System, listed above in "Low Cost for Simple Needs."

Complex Application Review Needs

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

CyberGrants

CyberGrants offers a highly configurable online hosted solution with a particularly strong base of corporate foundation clients. The system has an easy-to-navigate interface and very solid online data gathering capabilities—for example, online support for eligibility quizzes, proposals and progress reports—and administrative tracking features, such as the ability to update application information at any time, to attach internal use and coding fields to applications, and to create mail-merged letters. Internal tax status and OFAC checking is quite robust, and the

system benefits from a user-friendly ad hoc reporting engine. The system lacks an internal communication log, though, and the fact that every reviewer must have at least a limited license to access the system means it may not be the best solution for foundations who use many external reviewers. The system also has substantial ability to develop custom functionality to complement its standard features. As the vendor declined to provide pricing for the system, it is unclear to Idealware what types of organizations this system would best fit.

Easygrants

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

First Pearl

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 with five named users could expect to pay around $33,400 for the first year and $4,200 in annual recurring costs.

FluidReview

FluidReview is a configurable and polished online system with an emphasis on forms. The form builder is very flexible and easy to use, allowing users to drag and drop fields to add, remove, or rearrange application questions, with strong conditional logic for branching applications. Workflow is strong and rather straightforward to set up, as is application review. The vendor has made significant improvements to payment and budgeting functionality, and while email is fairly strong, users must create mail merges for letters or other print communications outside of the system. The vendor, Fluidware, was acquired by SurveyMonkey in 2014. A smaller foundation that awards about 10 grants per year may be able to get started with FluidReview for as little as $4,000, while a client with more advanced needs and larger grant programs may see annual costs up to $30,000.

GEMS

Mosaic's suite of software—which includes GEMS, STARS, and other customized implementations—is designed to support many facets of the human services sector besides grants management, and provides powerful capabilities in the realm of grant evaluation and contract-based budgeting. The system is used predominantly by government agencies throughout the United States, and in 29 countries in the developing world. The vendor provides consulting services and highly customized implementations for its customers

to help connect grants and improve outcomes with an organization's grantees. The software has a unique means of personalizing the interface, and it's easy to turn features and whole areas of the system on and off. While the system doesn't support merged letters or emails, GEMS plays to its strengths—specifically, the online application functionality and the robust, dedicated support for progress reports and outcomes tracking, which allows users to view progress by indicators, by individual grantee, or in aggregate, through a wizard-style interface. The system does not include a means of checking tax or OFAC status, although the vendor is willing to add such features during implementation. Support options—both online and phone—are also quite extensive. For a small foundation, the estimated cost for implementation plus the first-year license and support costs would be approximately $32,000, with a lower ongoing annual cost for maintenance and support. For a larger foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $155,000, with a lower ongoing annual cost for maintenance and support.

WebGrants

WebGrants is a well-designed mid-priced 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. Since Idealware last reviewed this system, the vendor has added support for forms that can branch based on form entries. It also reports that a new responsive interface will be available in late 2016. 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 the vendor must configure the system to allow administrators to search on more than just the basic grant record 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 either the user's or vendor's Internet servers—the vendor charges an annual hosting fee of $6,600 if using its servers. The license fee is typically between $15,000 and $45,000, depending on the size of the client, the level of configuration needed, and what additional modules are purchased.

Also consider Fluxx, foundationConnect, GIFTS Online, and SmartSimple GMS360°, listed above in "Flexible Relationship Management," Good Done Great Grant Management System, listed above in "Complex Online Data Collection," and WizeHive Grants Management System, listed above in "Low Cost for Simple Needs."

Strong Outcomes Measurement and Reporting

While most systems have supported, in some form, the ability to define requirements for grants and record interim progress reports, these solutions either provide a purpose-built module for recording and reporting on grantee outcomes across programs, or can leverage particularly strong custom reporting tools with existing support for progress reports.

EasyMatch

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

Fluxx

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as "dashboards" containing frequently viewed information. These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has added some new capabilities to let grantees manage their organization contacts in the system, the ability for new applicants to auto-fill their profile using GuideStar's Simplify Initiative, and support for grantees to manage all their grants for multiple funders in the system, through Grantseeker, a new standalone product. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Since the previous version of this report, the vendor now offers sophisticated reporting functionality for tracking outcomes data by grantee or program, although it's a standalone product called Impact Intelligence, which costs an additional $5,940 per year. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Pricing for the system is determined by multiple tiers, with differing levels of implementation and customization, starting at a flat fee of $5,940 per year for the Streamline tier for smaller organizations that do not require any custom build-out. Larger organizations, which require considerable build out, could pay up to $250,000 in the first year, with annual recurring costs starting at $50,000 per year.

GEMS

Mosaic's suite of software—which includes GEMS, STARS, and other customized implementations—is designed to support many facets of the human services sector besides grants management, and provides powerful capabilities in the realm of grant evaluation and contract-based budgeting. The system is used predominantly by government agencies throughout the United States, and in 29 countries in the developing world. The vendor provides consulting services and highly customized implementations for its customers to help connect grants and improve outcomes with an organization's grantees. The software has a unique means of personalizing the interface, and it's easy to turn features and whole areas of the system on and off. While the system doesn't support merged letters or emails, GEMS plays to its strengths—specifically, the online application functionality and the robust, dedicated support for progress reports and outcomes tracking, which allows users to view progress by indicators, by individual grantee, or in aggregate, through a wizard-style interface. The system does not include a means of checking tax or OFAC status, although the vendor is willing to add such features during implementation. Support options—both online and phone—are also quite extensive. For a small foundation, the estimated cost for implementation plus the first-year license and support costs would be approximately $32,000, with a lower ongoing annual cost for maintenance and support. For a larger foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $155,000, with a lower ongoing annual cost for maintenance and support.

Also consider First Akoya.net, foundationConnect, GIFTS Online, and SmartSimple GMS360°, listed above in "Flexible Relationship Management". Another system, GivingData, listed above in "Low Cost for Simple Needs", doesn't fare as well in the functionality we would typically expect for this category, but provides a robust outcomes monitoring module, designed for program staff to conduct evaluations themselves, rather than asking grantees to submit progress reports. If that model sounds suitable for your foundation, or matches the way you currently conduct evaluations, it would also be worth considering.

Substantial Functionality for the Needs of Large Foundations

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

Easygrants

Easygrants combines sophisticated functionality with the ability to customize in depth not only all online applications, review forms, and grantee reports, but all workflow and tasks required for each program—including who should do which task, and when. Each user is presented with an easy-to-parse list of upcoming tasks assigned to them in a portal-like format; they can also search the system or perform bulk processes such as send e-mails, print letters, or create reports. The system does not, however, easily support branching online forms. The system excels in its support for complex, online review processes, and is also good with mail-merged letters and automatic e-mail reminders. Since we last reviewed Easygrants, the vendor has added a new reporting engine, which supports visual data representations such as charts or graphs, but requires a separate login from the rest of the system. 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.

Granted GE Spectrum

Fusion Labs GE Spectrum is a standalone system which includes several facets, including the Granted GE grants management system and either the vendor's native Spectrum online web portal, or PROFFER online application management, which integrates with Blackbaud's NetCommunity. The system can integrate tightly with other Blackbaud products, too, such as Raiser's Edge, Financial Edge, and Blackbaud Enterprise CRM. However, unlike the earlier Granted GE system, those external products are no longer required for GE Spectrum. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Lab's online form modules supports reasonably sophisticated formatting of forms, including application branching, more sophisticated eligibility quizzes, and support for multiple logons for applicants from a single organization. Annual license costs range from around $11,000 to $110,000 based on the size of the foundation, with additional cost for initial configuration based on the complexity of the implementation.

Also consider Fluxx, foundationConnect, and SmartSimple GMS360°, listed above in "Flexible Relationship Management," or Good Done Great Grant Management System, listed above in "Complex Online Data Collection."

COMPARISON CHARTS

The six charts on the following pages compare the 29 systems we reviewed against six sets of specific criteria:

- Low Cost for Simple Needs
- Flexible Relationship Management
- Complex Online Data Collection
- Complex Application Review Needs
- Strong Outcomes Measurement and Reporting
- Substantial Functionality for the Needs of Large Foundations

While every grantmaker will base software decisions on a different set of factors, these charts help by explaining the various packages' strengths and weaknesses in areas important to most foundations. You can find the framework used to determine the ratings in Appendix B.

LOW-COST FOR SIMPLE NEEDS

LOW-COST FOR SIMPLE NEEDS	Common Grant Application	Foundant Grant Lifecyle Manager	GivingData	GrantMaker	GO: Grants Online™	PhilanTrack	PowerOFFICE
Small Grantmaker, basic functionality							
First year cost	$1,270	$4,750	$6,000	$3,700	$12,000	$6,000	$2,500 to $3,000
Ongoing yearly cost	$1,270	$3,250	$6,000	$2,700	$4,450	$3,000	$1,600 to $2,000
Large Grantmaker, basic functionality							
First year cost	$5,500	$7,500	$17,400	$14,000	$33,850	$20,000	$5,000 to $10,000
Ongoing yearly cost	$5,500	$6,000	$17,400	$12,000	$12,550	$9,000	$1,600 to $2,000
Internal Tracking	Basic	Solid	Solid	Basic	Solid	Solid	Solid
Online Applications–Grantmaker Experience	Basic	Solid	•	Basic	Advanced	Solid	Basic
Online Applications–Grantseeker Experience	Solid	Solid	•	Basic	Basic	Advanced	•
Form Design & Flexibility	Solid	Solid	•	Solid	Solid	•	•
Application Review	Solid	Solid	Basic	Basic	Basic	Solid	Solid
501(c)3 & OFAC Status	Basic	Solid	Basic	•	Basic *	Basic	•
Letters & Board Dockets	Solid	Advanced	Basic	Solid	Solid	Solid	Solid
Emails	Basic	Solid	Basic	Basic	Basic	Basic	Solid
Relationship Management	•	Solid	Solid	Basic	Solid	Basic	Solid **
Grant Requirements & Outcomes Evaluation	Basic	Solid	Basic	•	Solid	Solid	Solid **
Payments	Basic	Solid	Solid *	•	Basic **	Basic	Solid **
Budgeting	•	Solid	Advanced	•	Advanced **	Basic	Advanced
System Querying and Reporting	Solid	Solid	Solid	Solid	Solid	Solid	Solid
Permissions & Workflow	Basic	Solid	Solid	Basic	Solid	Basic	Basic
Data Access	Basic	Solid	Advanced	Basic	Basic	Advanced	Basic
Overall Customization	Solid	Solid	Solid	Solid	Solid	Solid	Solid
Ease of Use	Advanced	Advanced	Advanced	Solid	Advanced	Solid	Solid
Support & Training	Advanced	Advanced	Solid	Solid	Advanced	Solid	Solid
Stability in the Market	Basic	Advanced	Basic	Basic	Advanced	Advanced	Solid
Support Customer Experience	Outstanding	Outstanding	Outstanding	•	•	•	•
Training Customer Experience	Outstanding	Outstanding	Outstanding	•	•	•	•
Implementation Customer Experience	Outstanding	Good	Outstanding	•	•	•	•

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

*with module or app at additional cost

**with customization

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

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

LOW-COST FOR SIMPLE NEEDS (CONTINUED)	Smalldog	Submittable	WizeHive Grants Management System	ZoomGrants
Small Grantmaker, basic functionality				
First year cost	$32,000	$3,300	$2,998 to $10,788	$5,000
Ongoing yearly cost	$12,000	$3,300	$2,998 to $10,788	$4,500
Large Grantmaker, basic functionality				
First year cost	$32,000	$3,300	$2,998 to $24,995	$23,000
Ongoing yearly cost	$12,000	$3,300	$2,998 to $24,995	$22,500
Internal Tracking	Basic	Solid	Advanced	Basic
Online Applications—Grantmaker Experience	•	Basic	Basic	Basic
Online Applications—Grantseeker Experience	•	Basic	Advanced	Advanced
Form Design & Flexibility	•	Basic	Advanced	Solid
Application Review	•	Basic	Advanced	Solid
501(c)3 & OFAC Status	Basic	•	Basic	Basic
Letters & Board Dockets	Basic	Basic	Solid	Basic
Emails	Basic	Solid	Solid	Advanced
Relationship Management	Basic	•	Solid **	Basic
Grant Requirements & Outcomes Evaluation	•	Basic	Solid	Solid
Payments	Solid	•	Solid **	Solid
Budgeting	Advanced	•	Solid	Solid
System Querying and Reporting	Basic	Basic	Solid	Solid
Permissions & Workflow	Basic	Basic	Solid	Basic
Data Access	Solid	Advanced	Advanced	Basic
Overall Customization	•	•	Solid	Solid
Ease of Use	Basic	Advanced	Advanced	Solid
Support & Training	Advanced	Solid	Solid	Advanced
Stability in the Market	Solid	Advanced	Advanced	Advanced
Support Customer Experience	Outstanding	•	Below Average	•
Training Customer Experience	Outstanding	•	Below Average	•
Implementation Customer Experience	Below Average	•	Outstanding	•

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

*with module or app at additional cost

**with customization

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

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

FLEXIBLE RELATIONSHIP MANAGEMENT

FLEXIBLE RELATIONSHIP MANAGEMENT	First Akoya.net	Fluxx	foundation Connect	GIFTS Online	SmartSimple GMS360°	Zengine Grants Management
Small Grantmaker, basic functionality						
First year cost	$28,060	$5,940	$25,000 - $35,000	$3,900	$17,000 to $25,000	$2,998 to $10,788
Ongoing yearly cost	$9,600	$5,940	$7,500 - $15,000	$3,900	$7,500 to $12,000	$2,998 to $10,788
Large Grantmaker, basic functionality						
First year cost	$47,495	$50,000 to $250,000	$45,000 to $100,000	The vendor has declined to provide pricing	$25,000 to $100,000	$2,998 to $24,995
Ongoing yearly cost	$25,160	$7,500 to $50,000+	$25,000 to $65,000		$12,000 to $20,000	$2,998 to $24,995
Internal Tracking	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Online Applications—Grantmaker Experience	Advanced	Advanced	Advanced	Solid	Advanced	Basic
Online Applications—Grantseeker Experience	Advanced *	Advanced	Advanced **	Advanced	Advanced	Basic
Form Design & Flexibility	Solid	Solid	Solid	Solid	Advanced	Solid
Application Review	Advanced *	Advanced	Advanced *	Advanced	Advanced	Solid
501(c)3 & OFAC Status	Solid	Advanced	Advanced **	Advanced	Advanced	Basic
Letters & Board Dockets	Solid	Advanced	Advanced *	Advanced	Advanced	Advanced *
Emails	Advanced *	Advanced *	Advanced *	Solid	Advanced	Solid *
Relationship Management	Advanced *	Advanced	Advanced	Advanced	Advanced	Advanced *
Grant Requirements & Outcomes Evaluation	Advanced *	Advanced	Solid **	Advanced	Solid	Basic
Payments	Advanced *	Advanced	Advanced **	Solid	Solid	Solid **
Budgeting	Advanced *	Advanced	Advanced	Advanced *	Advanced	Advanced **
System Querying and Reporting	Advanced	Advanced	Advanced	Solid	Advanced	Solid
Permissions & Workflow	Advanced	Advanced	Advanced	Advanced	Advanced	Solid
Data Access	Advanced	Advanced	Advanced	Solid	Advanced	Advanced
Overall Customization	Advanced	Advanced	Advanced	Solid	Advanced	Advanced
Ease of Use	Solid	Solid	Advanced	Advanced	Advanced	Advanced
Support & Training	Advanced	Advanced	Solid	Advanced	Advanced	Advanced
Stability in the Market	Solid	Advanced	Advanced	Advanced	Advanced	Solid
Support Customer Experience	Below Average	Below Average	Good	Below Average	Below Average	•
Training Customer Experience	Below Average	Good	Below Average	Good	Below Average	•
Implementation Customer Experience	Below Average	Good	Below Average	Good	Good	•

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

*with module or app at additional cost

**with customization

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

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

COMPLEX ONLINE DATA COLLECTION

COMPLEX ONLINE DATA COLLECTION	Donation Xchange	First Akoya.net	foundation Connect	Good Done Great Grant Management System	Granted GE Spectrum	proposal CENTRAL
Small Grantmaker, basic functionality						
First year cost	$10,000	$28,060	$25,000 to $35,000	$21,800	$11,000	$10,000
Ongoing yearly cost	$5,000	$9,600	$7,500 to $15,000	$11,800	24% of Software Purchase Price	$9,000
Large Grantmaker, basic functionality						
First year cost	$40,000 and up	$47,495	$45,000 to $100,000	$71,370	$110,000	$55,000
Ongoing yearly cost	$20,000 and up	$25,160	$25,000 to $65,000	$42,870	24% of Software Purchase Price	$50,000
Internal Tracking	Solid	Advanced	Advanced	Advanced	Solid	Basic
Online Applications–Grantmaker Experience	Advanced	Advanced	Advanced	Advanced	Advanced	Basic
Online Applications–Grantseeker Experience	Advanced **	Advanced *	Advanced **	Advanced	Advanced	Solid
Form Design & Flexibility	Solid	Solid	Solid	Advanced	Solid	Basic
Application Review	Advanced **	Advanced *	Advanced *	Advanced	Advanced	Basic
501(c)3 & OFAC Status	Solid	Solid	Advanced **	Advanced	Solid	•
Letters & Board Dockets	Advanced **	Solid	Advanced *	Advanced	Advanced	Solid
Emails	Solid	Advanced *	Advanced *	Advanced *	Advanced	Solid
Relationship Management	Solid	Advanced *	Advanced	Solid	Basic	Basic
Grant Requirements & Outcomes Evaluation	Solid	Advanced *	Solid **	Solid	Solid	Solid
Payments	Solid	Advanced *	Advanced **	Solid	Solid	Advanced
Budgeting	Solid	Advanced *	Advanced	Advanced	Solid	•
System Querying and Reporting	Solid	Advanced	Advanced	Advanced	Solid	Solid
Permissions & Workflow	Solid	Advanced	Advanced	Advanced	Basic	Solid
Data Access	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Overall Customization	Solid	Advanced	Advanced	Advanced	Solid	Solid
Ease of Use	Solid	Solid	Advanced	Advanced	Solid	Basic
Support & Training	Solid	Advanced	Solid	Solid	Advanced	Advanced
Stability in the Market	Advanced	Solid	Advanced	Advanced	Advanced	Advanced
Support Customer Experience	•	Below Average	Good	•	Below Average	•
Training Customer Experience	•	Below Average	Below Average	•	Below Average	•
Implementation Customer Experience	•	Below Average	Below Average	•	Below Average	•

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

*with module or app at additional cost

**with customization

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COMPLEX ONLINE DATA COLLECTION (CONTINUED)	SmartSimple GMS360°	Versaic Grants	WizeHive Grants Management System
Small Grantmaker, basic functionality			
First year cost	$17,000 to $25,000	$25,000 and up	$2,998 to $10,788
Ongoing yearly cost	$7,500 to $12,000	$15,000 and up	$2,998 to $10,788
Large Grantmaker, basic functionality			
First year cost	$25,000 to $100,000	$60,000 and up	$2,998 to $24,995
Ongoing yearly cost	$12,000 to $20,000	$40,000 and up	$2,998 to $24,995
Internal Tracking	Advanced	Advanced **	Advanced
Online Applications–Grantmaker Experience	Advanced	Advanced	Basic
Online Applications–Grantseeker Experience	Advanced	Advanced	Advanced
Form Design & Flexibility	Advanced	Advanced	Advanced
Application Review	Advanced	Advanced **	Advanced
501(c)3 & OFAC Status	Advanced	Advanced	Basic
Letters & Board Dockets	Advanced	Advanced	Solid
Emails	Advanced	Solid	Solid
Relationship Management	Advanced	Solid **	Solid **
Grant Requirements & Outcomes Evaluation	Solid	Solid	Solid
Payments	Solid	Advanced **	Solid **
Budgeting	Advanced	Advanced	Solid
System Querying and Reporting	Advanced	Solid	Solid
Permissions & Workflow	Advanced	Advanced	Solid
Data Access	Advanced	Advanced	Advanced
Overall Customization	Advanced	Solid	Solid
Ease of Use	Advanced	Advanced	Advanced
Support & Training	Advanced	Advanced	Solid
Stability in the Market	Advanced	Advanced	Advanced
Support Customer Experience	Basic	Good	Good
Training Customer Experience	Basic	Good	Good
Implementation Customer Experience	Good	Good	Outstanding

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

*with module or app at additional cost

**with customization

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COMPLEX APPLICATION REVIEW NEEDS

COMPLEX APPLICATION REVIEW NEEDS	CyberGrants	Easygrants	First Pearl	FluidReview	Fluxx	GEMS
Small Grantmaker, basic functionality						
First year cost	The vendor has declined to provide pricing.	Not recommended for this size.	$33,400	$4,000 to $8,000	$5,940	$32,000
Ongoing yearly cost	The vendor has declined to provide pricing.	Not recommended for this size.	$4,200	$4,000 to $8,000	$5,940	Varies
Large Grantmaker, basic functionality						
First year cost	The vendor has declined to provide pricing.	$75,000 to $300,000	$60,150	$12,000 to $30,000	$50,000 to $250,000	$155,000
Ongoing yearly cost	The vendor has declined to provide pricing.	$30,000 to $50,000	$8,930	$12000 to $30000	$7,500 to $50,000+	Varies
Internal Tracking	Advanced **	Solid	Solid	Advanced	Advanced	Solid
Online Applications–Grantmaker Experience	Advanced	Advanced **	Solid	Advanced	Advanced	Solid
Online Applications–Grantseeker Experience	Solid	Solid	Solid	Basic	Advanced	Solid
Form Design & Flexibility	Solid	Solid	Solid	Solid	Solid	Solid
Application Review	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
501(c)3 & OFAC Status	Solid	Basic	Solid	Basic	Advanced	•
Letters & Board Dockets	Basic	Advanced	Solid	Basic	Advanced	•
Emails	Solid	Solid	Basic	Solid	Advanced *	Basic
Relationship Management	Basic	Solid	Solid	Solid	Advanced	Basic
Grant Requirements & Outcomes Evaluation	Solid	Solid	Solid	Solid	Advanced	Advanced
Payments	Solid	Solid	Solid *	Solid	Advanced	Solid
Budgeting	Advanced **	Advanced	Solid	Solid	Advanced	Advanced **
System Querying and Reporting	Solid	Solid	Solid	Solid	Advanced	Solid
Permissions & Workflow	Advanced **	Solid	Solid	Solid	Advanced	Solid
Data Access	Basic	Advanced	Advanced	Advanced	Advanced	Advanced
Overall Customization	Solid	Solid	Solid	Advanced	Advanced	Solid
Ease of Use	Advanced	Advanced	Basic	Advanced	Solid	Solid
Support & Training	Solid	Solid	Advanced	Advanced	Advanced	Advanced
Stability in the Market	Advanced	Solid	Advanced	Advanced	Advanced	Solid
Support Customer Experience	Basic	•	Good	Good	Basic	•
Training Customer Experience	Good	•	Good	Good	Good	•
Implementation Customer Experience	Basic	•	Basic	Outstanding	Good	•

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

*with module or app at additional cost

**with customization

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COMPLEX APPLICATION REVIEW NEEDS (CONTINUED)	GIFTS Online	Good Done Great Grant Management System	SmartSimple GMS360°	WebGrants	WizeHive Grants Management System
Small Grantmaker, basic functionality					
First year cost	$3,900	$21,800	$17,000 to $25,000	$20,000	$2,998 to $10,788
Ongoing yearly cost	$3,900	$11,800	$7,500 to $12,000	$13,200 to $18,800	$2,998 to $10,788
Large Grantmaker, basic functionality					
First year cost	The vendor has declined to provide pricing.	$71,370	$25,000 to $100,000	$245,000	$2,998 to $24,995
Ongoing yearly cost		$42,870	$12,000 to $20,000	$13,200 to $18,800	$2,998 to $24,995
Internal Tracking	Advanced	Advanced	Advanced	Advanced	Advanced
Online Applications—Grantmaker Experience	Solid	Advanced	Advanced	Basic	Basic
Online Applications—Grantseeker Experience	Advanced	Advanced	Advanced	Solid	Advanced
Form Design & Flexibility	Solid	Advanced	Advanced	Solid	Advanced
Application Review	Advanced	Advanced	Advanced	Advanced	Advanced
501(c)3 & OFAC Status	Advanced	Advanced	Advanced	•	Basic
Letters & Board Dockets	Advanced	Advanced	Advanced	Basic	Solid
Emails	Solid	Advanced *	Advanced	Solid	Solid
Relationship Management	Advanced	Solid	Advanced	Basic	Solid **
Grant Requirements & Outcomes Evaluation	Advanced	Solid	Solid	Solid	Solid
Payments	Solid	Solid	Solid	Advanced	Solid **
Budgeting	Advanced *	Advanced	Advanced	Basic	Solid
System Querying and Reporting	Solid	Advanced	Advanced	Basic	Solid
Permissions & Workflow	Advanced	Advanced	Advanced	Solid	Solid
Data Access	Solid	Advanced	Advanced	Advanced	Advanced
Overall Customization	Solid	Advanced	Advanced	Advanced	Solid
Ease of Use	Advanced	Advanced	Advanced	Solid	Advanced
Support & Training	Advanced	Solid	Advanced	Advanced	Solid
Stability in the Market	Advanced	Advanced	Advanced	Advanced	Advanced
Support Customer Experience	Basic	•	Basic	Basic	Good
Training Customer Experience	Good	•	Basic	Basic	Good
Implementation Customer Experience	Good	•	Good	Basic	Outstanding

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

*with module or app at additional cost

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STRONG OUTCOMES MEASUREMENT AND REPORTING

STRONG OUTCOMES MEASUREMENT AND REPORTING	EasyMatch	First Akoya.net	Fluxx	foundation Connect	GEMS	GIFTS Online	SmartSimple GMS360°
Small Grantmaker, basic functionality							
First year cost	$20,000 and up	$28,060	$5,940	$25,000 to $35,000	$32,000	$3,900	$17,000 to $25,000
Ongoing yearly cost	Program Minimum - $6,000 Annually	$9,600	$5,940	$7,500 to $15,000	Varies	$3,900	$7,500 to $12,000
Large Grantmaker, basic functionality							
First year cost	$20,000 and up	$47,495	$50,000 to $250,000	$45,000 to $100,000	$155,000	The vendor has declined to provide pricing.	$25,000 to $100,000
Ongoing yearly cost	$10,000 and up	$25,160	$7,500 to $50,000+	$25,000 to $65,000	Varies		$12,000 to $20,000
Internal Tracking	Solid	Advanced	Advanced	Advanced	Solid	Advanced	Advanced
Online Applications–Grantmaker Experience	Solid	Advanced	Advanced	Advanced	Solid	Solid	Advanced
Online Applications–Grantseeker Experience	Solid	Advanced *	Advanced	Advanced **	Solid	Advanced	Advanced
Form Design & Flexibility	Solid	Solid	Solid	Solid	Solid	Solid	Advanced
Application Review	Solid	Advanced *	Advanced	Advanced *	Advanced	Advanced	Advanced
501(c)3 & OFAC Status	Solid	Solid	Advanced	Advanced **	•	Advanced	Advanced
Letters & Board Dockets	Advanced	Solid	Advanced	Advanced *	•	Advanced	Advanced
Emails	Basic	Advanced *	Advanced *	Advanced *	Basic	Solid	Advanced
Relationship Management	Solid	Advanced *	Advanced	Advanced	Basic	Advanced	Advanced
Grant Requirements & Outcomes Evaluation	Solid	Advanced *	Advanced	Solid **	Advanced	Advanced	Solid
Payments	Solid	Advanced *	Advanced	Advanced **	Solid	Solid	Solid
Budgeting	Advanced	Advanced *	Advanced	Advanced	Advanced **	Advanced *	Advanced
System Querying and Reporting	Advanced	Advanced	Advanced	Advanced	Solid	Solid	Advanced
Permissions & Workflow	Basic	Advanced	Advanced	Advanced	Solid	Advanced	Advanced
Data Access	Advanced	Advanced	Advanced	Advanced	Advanced	Solid	Advanced
Overall Customization	Advanced	Advanced	Advanced	Advanced	Solid	Solid	Advanced
Ease of Use	Advanced	Solid	Solid	Advanced	Solid	Advanced	Advanced
Support & Training	Advanced	Advanced	Advanced	Solid	Advanced	Advanced	Advanced
Stability in the Market	Solid	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Support Customer Experience	•	Below Average	Below Average	Good	•	Below Average	Below Average
Training Customer Experience	•	Below Average	Good	Below Average	•	Good	Below Average
Implementation Customer Experience	•	Below Average	Good	Below Average	•	Good	Good

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

*with module or app at additional cost

**with customization

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SUBSTANTIAL FUNCTIONALITY FOR THE NEEDS OF LARGE FOUNDATIONS

SUBSTANTIAL FUNCTIONALITY FOR THE NEEDS OF LARGE FOUNDATIONS	Easygrants	Fluxx	foundation Connect	Granted GE Spectrum	Good Done Great Grant Management System	SmartSimple GMS360°
Small Grantmaker, basic functionality						
First year cost	Not recommended for this size.	$5,940	$25,000 to $35,000	$11,000	$21,800	$17,000 to $25,000
Ongoing yearly cost	Not recommended for this size.	$5,940	$7,500 to $15,000	24% of Software Purchase Price	$11,800	$7,500 to $12,000
Large Grantmaker, basic functionality						
First year cost	$75,000 to $300,000	$50,000 to $250,000	$45,000 to $100,000	$110,000	$71,370	$25,000 to $100,000
Ongoing yearly cost	$30,000 to $50,000	$7,500 to $50,000+	$25,000 to $65,000	24% of Software Purchase Price	$42,870	$12,000 to $20,000
Internal Tracking	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Online Applications–Grantmaker Experience	Advanced **	Advanced	Advanced	Advanced	Advanced	Advanced
Online Applications–Grantseeker Experience	Solid	Advanced	Advanced **	Advanced	Advanced	Advanced
Form Design & Flexibility	Solid	Solid	Solid	Solid	Advanced	Advanced
Application Review	Advanced	Advanced	Advanced *	Advanced	Advanced	Advanced
501(c)3 & OFAC Status	Basic	Advanced	Advanced **	Solid	Advanced	Advanced
Letters & Board Dockets	Advanced	Advanced	Advanced *	Advanced	Advanced	Advanced
Emails	Solid	Advanced *	Advanced *	Advanced	Advanced *	Advanced
Relationship Management	Solid	Advanced	Advanced	Basic	Solid	Advanced
Grant Requirements & Outcomes Evaluation	Solid	Advanced	Solid **	Solid	Solid	Solid
Payments	Solid	Advanced	Advanced **	Solid	Solid	Solid
Budgeting	Advanced	Advanced	Advanced	Solid	Advanced	Advanced
System Querying and Reporting	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Permissions & Workflow	Solid	Advanced	Advanced	Basic	Advanced	Advanced
Data Access	Advanced	Advanced	Advanced	Advanced	Advanced	Advanced
Overall Customization	Solid	Advanced	Advanced	Solid	Advanced	Advanced
Ease of Use	Advanced	Solid	Advanced	Solid	Advanced	Advanced
Support & Training	Solid	Advanced	Solid	Advanced	Solid	Advanced
Stability in the Market	Solid	Advanced	Advanced	Advanced	Advanced	Advanced
Support Customer Experience	•	Basic	Good	Basic	•	Basic
Training Customer Experience	•	Good	Basic	Basic	•	Basic
Implementation Customer Experience	•	Good	Basic	Basic	•	Good

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

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**with customization

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

HOW TO DECIDE

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

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

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

environment? For instance, if your staff is using Macs, you may have trouble finding a package that can be easily installed. Will your existing hardware support the new software, or will you need to purchase new equipment? Will you need to bring on a staff member or consultant to maintain and upgrade the software? If you'll need additional resources, make sure you account for that in the price of the software.

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

With that list of important features in hand, contact the vendors and ask for demo. 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 demonstrated—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?

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

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

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 vendor has made significant improvements around creating and formatting applications, and the system includes a helpful, well-thought-out feature for applicants to reuse information. The system can support both grants to nonprofits and scholarships for individual applicants, and allows both individuals and organizations to apply to the same grant programs. The vendor also reports being willing to customize the system at no cost to the client and roll out those changes to all users if the new functionality is deemed useful to the user community. On the other hand, much grantmaker functionality is notably absent, and relationship management is all but nonexistent, as is support for budgeting. Common Grant Application does not handle mail-merge fields for print or email correspondence. There is some ability to track payments, but no functionality to make payments contingent on a reporting requirement. The system now supports saving a list of favorite reports for easy access, and all visible system fields can be queried and included in both standard and ad-hoc reports—for instance, reports can be configured to include just text fields. Common Grant Application calculates its pricing partially by taking into account the number of applications received in a given year. For instance, a small foundation that receives only 10 applications annually could use Common Grant Application for around $1,270 per year, while a very large foundation with 100 applications a year could expect an annual fee of about $5,500. Ongoing support and training is included at no additional cost.

- **Pricing (small org)**: First Year: $1,270.00
- **Pricing (small org)**: Annual Recurring: $1,270.00
- **Pricing (large org)**: First Year: $5,500.00
- **Pricing (large org)**: Annual Recurring: $5,500.00

Internal Tracking

- **Grant Cycle Linkages**: Grants and applications are split within the system.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle, but not by board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not by percentage or dollar allocations.
- **Splitting Categories**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Does not let you define custom categorization codes, although the vendor suggested that custom reports could help retrieve some information.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: 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 as 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 to Grant Records**: Lets you perform batch updates of some fields.
- **Support for Industry Taxonomy**: The system has a taxonomy within the system that is partially based on the National Taxonomy of Exempt Entities.
- **Ability to View Related Records and Data Across Records**: To see related records and data across records, you need to apply a filter to certain views.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications.
- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages**: The system supports two application stages, including a letter of intent and a main application stage.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There's no ability for the grantee, applicant, or grantmaker to transfer an account and history to new staff contact without having to share a staffer's username and password. The vendor must perform this transfer if the previous owner's user name and password is not accessible.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The system will, however, automatically fill in some fields in the applicant profile through the result of an online search.
- **Viewing Proposal 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 for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved as each section of the application is completed.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.

- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. Foundation staff can choose to allow single or multiple submissions per applicant per giving opportunity. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: Applicants or grantees can manage all grant information for all of their funders in the system by using a single sign-on, and see the history of all applications they have submitted in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not have the ability to let a grantee work on a proposal, save it as a draft, and get comments or suggestions from a reviewer. The application is private to the grantseeker until it is submitted.
- **Security Scan for Uploaded Documents**: Offers a basic virus scan feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

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

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization, although you can track by different grantmaker programs.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relation-

ships to you and to a specific grant.

- **Customized Communication by Contact Role**: It's not possible to communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact or email reporting reminder to report contact).
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications. These are posted to individual user message boards.
- **Call and Email Logging**: Does not let you keep a log of outside communications, such as phone calls and email.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Does not have the ability to "branch" data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both original outcome goals and grantee responses from submitted progress reports on the same screen, by running a custom report.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, but you cannot merge field info from requirement into reminder email.
- **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.
- **Creating Online Progress Report Forms**: Lets you specify templates for online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system does not have the ability to support user groups in order to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and then run custom reports to view progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals combined with the system reporting functionality. The vendor reports that foundation staff could configure the system to automatically calculate grantee progress toward outcome goals.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests or print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: You can view payments due, but the system does not record prerequisite requirements

associate with payments.

- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate, possibly at additional cost.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Supports grants made in multiple currencies, but does not include foreign exchange information.
- **Multi-Currency Reporting**: Supports reporting on grants and payments in multiple currencies, but does not include foreign exchange information.
- **Contingent/Conditional Payments**: Does not allow you to set up payments contingent upon specified requirements.
- **Payment Controls**: Does not let you set up payment controls to ensure that only certain staff can change payment information. Users can be assigned to set roles, some of which have limited access to payment information, but these roles and associated permissions, are not configurable.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.
- **Payment Notes**: There is no ability include notes on payments, but you can include a reference number.
- **Payment Reporting**: Reports on payments do not carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view requested and approved payments for their award(s) online through the grantee portal, but not upcoming payments.
- **Other Payment Issues**: It's not possible to void payments, make refunds, or place payments on hold. There is no ability to update payment details (e.g., general ledger account, fund, etc.) in batch or create payments in batch. There is no ability to track quid pro quo and in kind payments.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you save favorite reports on the Reports tab.

- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping and headers, but not logos.
- **Grant Summary Tracking**: You can define codes and see them in reports, but these codes cannot be rolled up hierarchically—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: There's no ability to create, view, and export data in a visual graphic representation (e.g., charts, graphs), although data is exportable to Excel for such transformation.
- **User Dashboards**: The system does not provide "dashboard" views that summarize the grants currently relevant to each individual user or have the ability for users to create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system does not contain report templates to easily align data with reporting standards used by the sector.

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

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity and Security**: Common Grant Application uses the Secure Sockets Layer (SSL) security mechanism to ensure the security and privacy of some data transmitted in the system.

Overall Customization

- **Dropdown Fields**: Some dropdown values are customizable but not all.
- **Internal Tracking Fields**: Does not let you add custom "internal tracking" fields for staff use.

- **Custom Fields**: Does not let you add custom fields throughout the system. The vendor customizes the system for clients at the time of implementation.
- **Online Information Customization**: Lets you store custom information submitted by grantees, such as application narratives or progress report metrics. Online progress report forms can be customized with the foundation's logo.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at no additional cost.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: There is no ability to define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Some configuration or customization as described above—such as new online forms and some dropdown values—can be performed by the user without involvement from the vendor.

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.
- **Online Support**: Vendor provides online help in the form of customized YouTube videos and in-system help.
- **Manuals and Documentation**: The vendor provides an online manual at the following URL: http://www.commongrantapplication.com/manual/pub/pub_manual.php
- **Training**: The vendor provides initial training via phone and the Internet at no additional cost, and additional training sessions can be scheduled. In-person training can be scheduled for a nominal fee.
- **User Support Forums**: There are no support forums available for this system.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2007; Common Grant Application has been in use since 2007.
- **Client Base**: The vendor reports that it has 30 clients. Breakdown by foundation type is approximately 40% private and family, 20% public, 15% community, 10% government, and 15% corporate.
- **Sustainability**: Operating and personnel expenses are not currently covered by the revenue the system generates.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 7
- **Percent of Survey Respondants who Would Recommend the system**: 100 percent.
- **Training Score**: 1.71
- **Implementation Score**: 1.64
- **Support Score**: 1.73

CYBERGRANTS

CyberGrants offers a highly configurable online hosted solution with a particularly strong base of corporate foundation clients. The system has an easy-to-navigate interface and very solid online data gathering capabilities—for example, online support for eligibility quizzes, proposals, and progress reports. Its 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 is also solid. Internal tax status and OFAC checking is quite robust, and the system benefits from a user-friendly ad hoc reporting engine. However, the system lacks an internal communication log, and the fact that every reviewer must have at least a limited license to access the system means it may not be the best solution for foundations that use many external reviewers. The system also has substantial ability to develop custom functionality to complement its standard features. As the vendor declined to provide pricing for the system, it is unclear to Idealware what types of organizations this system would best fit.

- **Pricing (small org)**: First Year: The vendor has declined to provide pricing for the system.
- **Pricing (small org)**: Annual Recurring: The vendor has declined to provide pricing for the system.
- **Pricing (large org)**: First Year: The vendor has declined to provide pricing for the system.
- **Pricing (large org)**: Annual Recurring: The vendor has declined to provide pricing for the system.

Internal Tracking

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

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create unlimited online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications through conditional fields.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations through conditional fields.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: It's not possible for a grantseeker to transfer their account and history to another person within that organization. An administrator at the foundation can make the transfer on the back end.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages in the sandbox environment. More sophisticated applications are configured by the vendor.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Lost credentials can easily be reset by the applicant, but grantmakers must contact their administrator or the vendor to reset theirs.
- **Viewing Applications**: Applications can be viewed by applicants at any stage, but a formatted "print view" is only available for completed applications.
- **Preview Packet**: The preview packet does not include uploaded documents.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: Applicants and grantees manage all grant information for all their funders within the system with a single username and password.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not let applicants work on a proposal, submit as a draft, get comments and suggestions from reviewers, and work back and forth until a proposal is complete. However, you can send the application back to the applicant after submission.
- **Security Scan for Uploaded Documents**: The system has a virus scan/security feature to prevent malicious files from being uploaded into the application or downloaded onto system.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Forms are highly configurable to match an organization's brand.
- **Character and Word Counts**: The system includes character but not word counts for application questions. An administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes in-system help editable by the vendor. Grantees and applicants can contact the vendor directly for technical assistance.

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry and flags those not listed at the point of an organization's registration. Checks other lists, including those from Australia, NCES, Great Britain, and Canada. Includes date and time stamp which can serve as an audit trail demonstration completion of due diligence step(s). You cannot perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist and money laundering watch lists within the grants management system itself through Bridger, a LexisNexis tool. Includes date and time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s). You cannot perform checks and updates in batch.
- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself. The vendor reports that this can be configured, but will require additional licensing costs from GuideStar.

- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent through blind copies, and there is a designated "reply-to" address.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and edit them after they've been merged.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics, but you can see if an email is undeliverable.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: You would need to delete an individual no longer associated with a grant to have them not show up as an active contact for communication. They would still show up in the system's audit trail.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can be configured to track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact or email reporting reminder to report contact).
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you 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 & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" data collection based on type of grant through conditional fields.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen through custom reports or adding custom fields on the grant record.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines and pull merge field info from requirement into reminder email.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees through ad hoc reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but the vendor generally configures more complex forms.
- **Supporting Data Collection for User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

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, through customization.
- **Check Requests**: Can generate a paper check request for accounting and print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: You must run a report to see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirement
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors). There's a standard field for "in care of" recipients.
- **Electronic Payments**: Supports ACH payments and wire transfers through custom configuration.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages by building a custom feed at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.

- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, through customization.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts through ad hoc reporting.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this could be configured upon request.
- **Other Payment Issues**: Lets you void, make refunds, and place payments on hold. Lets you track quid pro quo and in kind payments. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is designed to be easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed. The system has strong support for ad hoc reporting, however.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set. "One-Click Reports" saves a query. You can also tag reports.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants—through ad hoc reporting.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.

- **Report Drill-Down**: Lets you drill down for more information on ad hoc reports.
- **Attachment Searching**: Does not currently let you search within attached documents, although the vendor reports this feature is now available in beta.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports**: It's not possible to create, view, and export data in a visual graphic representation (e.g., charts, graphs) other than in the Dashboard section.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users cannot create their own dashboards, but administrators have those permissions.
- **Industry-Standard Reporting Templates**: The system contains the Foundation Center eReporting Excel format and Reporting Commitment hGrant format.

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 that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Could provide a focused, roles-based view for management and board members via dashboards and role definitions.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Does not allow a programmer to create custom data flows to an external system. CyberGrants does this themselves.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. The vendor is in the process of optimizing the user interface to be mobile and tablet responsive.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. The vendor is in the process of optimizing the user interface to be mobile and tablet responsive.
- **Data Integrity and Security**: The vendor uses SSL and 256 bit encryption to protect data in the system.

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 Fields**: Lets you add unlimited custom fields of 18 different types throughout the system that for the most part have the same permissions as system-generated fields. You can see when a field was published, but not all the details about it in the audit log.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.

- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost. Implementation includes some customization.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, and make sure that enhancements don't affect customizations through the maintenance fees.
- **Support for Multiple Languages**: Lets you define custom language sets for public-facing forms, but not for the admin interface.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user without involvement from the vendor.

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 support at additional cost.
- **Online Support**: Vendor provides FAQ's configurable by the grantmaker for each of their giving programs and provides email support to all clients' grantseekers at no additional cost.
- **Manuals and Documentation**: Manuals and release notes are available online. Clients have access to webinars of new features after a release.
- **Training**: The vendor provides initial training in person or via the Internet at additional cost and additional training sessions can be scheduled.
- **User Support Forums**: User support forums or discussion groups are available.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1999. The software was developed as a custom tool and has been in use since 2001. CyberGrants was acquired by Waud Capital in 2015.
- **Client Base**: The vendor reports that it has about 300 clients. Breakdown by foundation type is 13.3% private, 8.7% family, 76.5% corporate, and 1.4% government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 5
- **Percent of Survey Respondants who Would Recommend the system**: 80 percent [Note that this represented 4 out of the 5 people who answered this question.]
- **Training Score**: 1.12
- **Implementation Score**: 0.47
- **Support Score**: 1.13

DONATIONXCHANGE

This hosted, online system, specializing primarily in corporate and private foundations, provides well-rounded functionality. DonationXchange has solid application review features and online application forms are flexible, with the option to embed the forms directly in a webpage. Budgeting in the system is mostly solid. A smaller foundation with five users dealing with fewer than 100 grants a year could get up and running in the system for about $10,000; larger foundations dealing with 100 grants or more per year and ten concurrent users could expect to pay $40,000 or more in the first year.

- **Pricing (small org)**: First Year: $10,000
- **Pricing (small org)**: Annual Recurring: $5,000
- **Pricing (large org)**: First Year: $40,000 and up
- **Pricing (large org)**: Annual Recurring: $20,000 and up

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, through custom fields only.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, grant type, program, and grant cycle.
- **Handling Paper Applications**: Applications received as paper can be easily entered into the system through the "quick request add" interface.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates to Grant Records**: Does not easily let you perform batch updates of defined coding and other fields. Users can run a query for records that need to be updated and manually change values for the individual results.
- **Support for Industry Taxonomy**: The system supports top-level NTEE codes out-of-the-box. Additional levels, keywords, and categories can be configured by the user or vendor.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

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

- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant add new staff contacts to their account from the front-facing interface, but applicants with admin permissions must contact the vendor to transfer their permissions to a new staff contact.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal. The vendor reports that this could be configured for individual clients.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile when applying to a grant for the first time by entering their EIN number, but organization information can be carried over from one application to another.
- **Viewing Proposal 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 for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not let applicants work on a proposal, submit as a draft, then allow reviewer to comment and make suggestions, and work back and forth until a proposal is complete. However, you can send the application back to the applicant after submission.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation. You can also embed forms on your website.
- **Character and Word Counts**: The vendor can set character counts, but not word counts, for application questions, and can set a max limit, but not a minimum, for each.

- **In-System Help for Applicants**: Clients have the ability to customize the text around an application form to provide additional instructional text. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or were granted in the past.
- **Requirements Checklist**: There's no specific checklist functionality, but grantors could create a user defined form that contains a checklist, which could be attached to the grant record. Additional tasks can be assigned to applicants through the system workflow functionality.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: External reviewers are able to independently print the summary and full details of the grant easily.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors, and add comments, through custom fields on the review template.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be set up and customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest by tracking them as contacts in the system, and use those criteria to assign applications for review. This can be done automatically using a custom workflow.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified via email when reviews are completed.

501(c)(3) and OFAC Status

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

Letters and Board Dockets

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

- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: You can configure the system to print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system supports electronic signatures through integration with DocuSign.
- **Electronic Templates**: Includes templates for print and electronic formats.

Emails

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

Relationship Management

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

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.

- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is not possible to view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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 a staff member 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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

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

- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments that carry coding attributes of associated requests/organizations/contacts.
- **Viewing Payment Schedule Online**: Grantees can view paid, but not scheduled, payments for their award(s) online through the grantee portal.
- **Other Payment Issues**: Scheduled and pending payments can be voided, refunded, or put on hold, but not after the payment has been released. Batch updates to payment details are only possible by manually importing the data as a spreadsheet.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending). However, you cannot easily track additional categories—for example, to track budgets for both programs and geographic areas.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to payments.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.

System Querying and Reporting

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

- **Automating Reports**: Lets you set up reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: The system contains the Foundation Center eReporting Excel format.

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 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 of the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users with a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Provides a responsive interface specifically designed to see, code, approve, and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor provides robust documentation regarding security that highlights the redundancy of the data stored on its server.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Lets you create unlimited custom fields within the system that have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

Ease of Use

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

Support and Training

- **Phone Support**: Vendor provides phone support, but it costs extra, depending on license agreement.
- **Online Support**: Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation**: The vendor provides manuals and help documentation online.
- **Training**: The vendor provides initial training in person or via the Internet at no additional cost. Additional training sessions can be scheduled.
- **User Support Forums**: Currently, there are no user support forums or discussion groups available.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2000; the system has been in use by clients since 2009.
- **Client Base**: The vendor reports that it has about 430 clients. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

EASYGRANTS

Easygrants combines sophisticated functionality with the ability to customize in depth not only all online applications, review forms, and grantee reports, but all workflow and tasks required for each program—including who should do which task, and when. Each user is presented with an easy-to-parse list of upcoming tasks assigned to them in a portal-like format; they can also search the system or perform bulk processes such as send e-mails, print letters, or create reports. The system does not, however, easily support branching online forms. The system excels in its support for complex, online review processes, and is also good with mail-merged letters and automatic e-mail reminders. Since we last reviewed Easygrants, the vendor has added a new reporting engine, which supports visual data representations such as charts or graphs, but requires a separate log-in from the rest of the system. 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.

- **Pricing (small org)**: First Year Not recommended for this size.
- **Pricing (small org)**: Annual RecurringNot recommended for this size.
- **Pricing (large org)**: First Year $75,000 - $300,000
- **Pricing (large org)**: Annual Recurring $30,000 - $50,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and see the specific percent allocation of a grant across each.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching for Grant Records**: 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 as 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 to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy it desires.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's not possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 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 many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: An applicant record represents an individual, separate from the organization. When a new staff member creates an account, they can be connected to the organization's prior grant history.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number, but organization information can be carried over from one application to another.
- **Viewing Proposal 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**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but applicants can be prompted to save their work at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and then work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, but for a minimal extra cost the vendor could allow 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.
- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create emails for 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, unless the client hosts the system itself. In this case, emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

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

- **Contact Synchronization**: System allows you to automatically synchronize contacts with CRM systems, but not with Outlook. Requires customization at additional cost.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on grantee responses. The vendor can also customize collection forms to meet requirements in terms of branching.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data on the grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting packages, including QuickBooks, Oracle Financials, Aggresso, 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for PRIs.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated request/organizations/contacts to an accounting system.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award's) online through the grantee portal.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system has the ability to update payment details in batch using the import tool, and to create payments in batch using the scheduling tool. In-kind and quid pro quo payments can be tracked separately from payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grant 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.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year, by linking funds and individual line items across multiple years.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios, but this requires a module at additional cost.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayment on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include, and filter by, nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.

- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments, but only through an optional integration with Microsoft SharePoint.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, including the Foundation Center eReporting Excel format.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of the pre-determined foundation staff roles, but there's no out-of-the-box ability to customize these roles or what permissions they have. The vendor reports that an update scheduled for May 2016 will provide some additional ability to define new roles and permissions.
- **Field-Level Permissions**: You can define user or group permissions on a field-by-field basis at additional cost.
- **Role-Based Interfaces**: Provides two different internal interfaces. One shows all system functionality. The other shows only the tasks specifically assigned to the user.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members, but requires add-on at additional cost.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

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

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use, which are created by the vendor as part of the initial setup process.
- **Custom Fields**: The system allows for a limited number of custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. Existing system fields can be renamed.

- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, but possibly on a delayed schedule depending on degree of customization.
- **Support for Multiple Languages**: It's possible for clients to define custom language sets for system field and menu item labels, or create application forms in multiple languages.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 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 needed.

Support and Training

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

Installation and Maintenance

- **Installation and Maintenance**: Software: Clients need user licenses for underlying systems (SQL, Windows Server, IIS Web server, SharePoint). Hardware: Larger organizations will want to install redundant hardware (e.g. replicated database server with automated failover) and web servers with load balancing. For mid-size organizations, best performance is provided by separating the functions onto separate servers: database server, web server for the application/users, and 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 it has about 17 clients. Breakdown by foundation type is approximately 65% non-profit, 29% international, and 24% government.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 1
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**:N/A
- **Support Score**: N/A

EASYMATCH

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

- **Pricing (small org)**: First Year: $20,000 and up
- **Pricing (small org)**: Annual Recurring: Program Minimum - $6,000 Annually
- **Pricing (large org)**: First Year: $20,000 and up
- **Pricing (large org)**: Annual Recurring: $10,000 and up

Internal Tracking

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

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system can be configured to allow both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor, though the vendor typically configures these forms for clients. Training is available to help you customize the system yourself.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program, though the vendor typically configures these forms for clients. Training is available to help you customize the system yourself.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 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 many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Authorized representatives from grantseeking organizations can update staff account information to transfer a departing staffer's history to a new user, as well as create a new user. The foundation can also perform this transfer from the back end.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile from tax records by entering their EIN number.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but that message can only be customized by the vendor. The message template itself is customizable.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages—though the vendor typically does this for clients.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system does not explicitly support application process via mobile or tablet, although the administrative interface is fully functional on a tablet device.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system, and prompts the registrant with the existing credentials at the time of registration.
- **Unified Accounts Across Grantmakers**: There's no means for applicants or grantees to manage all grant information for all funders in the system.

- **Collaboration Between Grantseeker and Funding Organization**: The system does not have the ability to let a grantee work on a proposal, submit it, allow a reviewer to comment or make suggestions, and then work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes guidelines and FAQs that are editable by the foundation staff. Grantseekers can contact JK Group directly for any assistance regarding the grantmaker's program.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees. This is configured by the vendor during implementation.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can print grant summaries or full grant information by clicking a "print" icon within the application itself. Uploaded files will show as links within the system.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: Reviewers can view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: The vendor can define automatic steps and rules, or "workflow," for the grants review process. Vendor can also make changes to workflow, 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. Scoring schemes are customizable only by the vendor.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Does not let you track external reviewers' interests and potential conflicts of interest, or have the ability to track reviewers and applications by geography or other criteria defined by the grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. You can assign different weights to the scores and then aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, but only on the home page, not via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Lets you click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits via the IRS database. The vendor also provides (optional) comprehensive organization vetting and compliance services. Tax verification includes all 501c types. Fields are autopopulated with related information. All such

checks performed by client include data/time stamp which can serve as an audit trail demonstrating completion of due diligence step(s).

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. JK Group's systems are tied to Thomson Reuters Accelus Worldcheck. Fields are autopopulated with related information. All such checks performed by client include data/time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s).
- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.

- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, to send the payment letter to the payment contact, or email a reporting reminder to the report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you automatically capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: You can set up default requirements that apply to all grants by type of grant (e.g., in-kind, scholarships, etc.), but only the vendor can alter requirements for each grantee individually.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen through custom reports or adding custom fields to the grant record.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines and merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but doesn't include suggested formats.
- **User Groups**: Does not support user groups to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that automatically applies to all grants, but cannot be updated for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. Lets you print checks directly from the system, but only one at a time. The vendor offers check printing as a service.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.

- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but can export payment information to a csv file that can be imported into an accounting package.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but system .
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The vendor can customize the system to support interest repayments on PRIs. The system allows users to manually define a repayment schedule for PRIs.
- **Payment Notes**: Does not let you include a note on a payment.
- **Payment Reporting**: Lets you pull reports on payments that carry the coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void or place a hold on payments, but only if your organization (and not the vendor) is handling payment processing. The system has robust support for quid pro quo and in-kind payments. The vendor can create and update payments in batch for you.

Budgeting

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

System Querying and Reporting

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

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

Data Access

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

- **Mobile Device Application Review**: Does not explicitly support application review via mobile or tablet devices. Most tablets and mobile devices, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets and mobile devices, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: JK Group undertakes a SSAE 16 Audit each year, and reports that their systems must adhere to some of the most stringent IT, security and operational protocols in the world. More information is available upon request from the vendor.

Overall Customization

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

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 them.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but the user 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 needed.

Support and Training

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

Installation and Maintenance

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

Vendor Background

- **History**: The vendor has been in business since 1989. This package has been in use by clients since 2002.
- **Client Base**: The vendor reports that it has 30 clients using the grants management solution. Client breakdown by type is 45% corporations and 55% corporate foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 2
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**:N/A
- **Support Score**: N/A

FIRST AKOYA.NET

First Akoya.net, Bromelkamp's online grants management system built on Microsoft's Dynamics CRM platform, provides solid mid-level functionality for a great price. The system leverages its Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, First Pearl, First 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's functionality. The outcomes module provides strong reporting on grantee progress, and grant requirements and progress report forms can be customized by giving program, but you'll need the Builder module, at extra cost, to create new forms without paying additional fees. The vendor is open to performing custom development at additional cost for clients who need it and there are Dynamics CRM and First Akoya.net APIs available for those who want to extend the system themselves. Initial setup fees start at $9,870 and $1,920 annually for the first user. Each additional user costs $870 per year.

- **Pricing (small org)**: First Year: $28,060
- **Pricing (small org)**: Annual Recurring: $9,600
- **Pricing (large org)**: First Year: $47,495
- **Pricing (large org)**: Annual Recurring: $25,160

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocation.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs.
- **Searching for Grant Records**: 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 as 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, through integration with Microsoft SharePoint.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no built-in compliance for an industry-standard taxonomy in the system. Users have the ability to customize system menus and field labels to match a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor, but requires eGrant.net Builder module at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed—with the eGrant.net module.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that they can integrate with Simplify Initiative by request, at additional cost.
- **Viewing Proposal 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 eGrant.net Builder module, at additional charge.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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 information is saved when the applicant navigates between sections, and the system warns you at regular intervals if you do not save manually.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system will check the applicant ID of a new registrant to make sure it isn't already in the system. The system will prompt users with a list of possible duplicates to manually dedupe.
- **Unified Accounts Across Grantmakers**: Applicants can use the same credentials in the eGrant.net module across all foundations on the system, but cannot manage grant information for all funders through the same account.

- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal and request additional information from the applicant via email, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry and flags those not listed. The system checks against IRS Publication 78 via GuideStar Charity Check.
- **OFAC Status Checking**: Lets you compare organizations against standard OFAC and other terrorist watch lists within the grants management system itself, but individuals cannot be checked. The system checks against LexisNexis Bridger Insight.

- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, but they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.

- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through templates.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from Microsoft Outlook into grantee or organization records.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook, but requires a module at no additional cost.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by program and customize them for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but requires the eGrant.net Builder module at additional cost.
- **Supporting Data Collection for User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports, through the Outcomes module.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including Intacct and QuickBooks, 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, 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system can automatically generate a repayment schedule for PRIs through a separate product, at additional cost.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this could be done using custom fields on in-system status messages to grantees.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system creates payments in batch using the scheduling tool. Payment details can be updated in batch through the bulk edit tool or update queries. The system can track the monetary value of in-kind and quid pro quo payments.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.

- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you 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, and grouping, but not logos or headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: 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.
- **Automating Reports**: Lets you set reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Lets you create your own multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system contains the Foundation Center eReporting Excel format, but not IATI Reporting Commitment or hGrant format. Users can add these themselves or ask the vendor to do so at additional cost.

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 a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users with a "task list" when they sign onto the system, via integration with Outlook.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members, which can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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 First Akoya.net through the Dynamics API.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.

- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device. An iOS and Android app for Microsoft Dynamics itself is also available.
- **Data Integrity and Security**: The vendor reports that the system protects data through SSL security with multiple firewall protections and constant multiple-site backup.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: There is no limit to the number of custom fields that can be created. Lets users rename existing system fields, except for about a dozen core fields. Information stored in custom fields is included in searches and reports.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms using the eGrant.net Builder module, at additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets for admin users and reviewers based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides phone support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Online Support**: Vendor provides email support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Manuals and Documentation**: The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.
- **Training**: The vendor provides initial training in person at no additional cost. Additional training sessions can be scheduled at additional cost.
- **User Support Forums**: There are currently no support forums available for this system. The vendor reports that user support forums or discussion groups will be available in 2016.
- **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 1978; First Akoya.net has been in use since 2010.
- **Client Base**: The vendor reports that First Akoya.net has fifteen clients, including private/family foundations, corporate grantmakers, arts, and government agencies.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 8
- **Percent of Survey Respondants who Would Recommend the system**: 50 percent [Note that this represented 4 out of the 8 people who answered this question.]
- **Training Score**: 0.90
- **Implementation Score**: 0.65
- **Support Score**: 0.92

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 with five named users could expect to pay around $33,400 for the first year and $4,200 in annual recurring costs.

- **Pricing (small org)**: First Year: $33,400
- **Pricing (small org)**: Annual Recurring: $4,200
- **Pricing (large org)**: First Year: $60,150
- **Pricing (large org)**: Annual Recurring: $8,930

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs.
- **Searching for Grant Records**: 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 as 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 that begins with the record number.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields, but requires knowledge of Microsoft Access queries. Alternatively, users could use Microsoft Access's Find and Replace tool.
- **Support for Industry Taxonomy**: The system supports the industry-standard taxonomy defined by the Foundation Center.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor, but requires eGrant.net Builder module at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed—with the eGrant.net module.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that they can integrate with Simplify Initiative by request, at additional cost.
- **Viewing Proposal 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 eGrant.net Builder module, at additional charge.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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 information is saved when the applicant navigates between sections, and the system warns you at regular intervals if you do not save manually.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system will check the applicant ID of a new registrant to make sure it isn't already in the system. The system will prompt users with a list of possible duplicates to manually dedupe.
- **Unified Accounts Across Grantmakers**: Applicants can use the same credentials in the eGrant.net module across all foundations on the system, but cannot manage grant information for all funders through the same account.

- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal and request additional information from the applicant via email, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

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

Application Review

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

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. The system supports tax verification for all 501(c) types.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists via an export to ChoicePoint's Bridger Insight.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself at an additional cost.
- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, but they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Can send email to any contact recorded in an application form.

- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you 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 & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is possible to view both outcome goals and actuals on the same screen through 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.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. Email templates built using Microsoft Word can include merge fields in order to include information specific to the grant program in question.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, through Bromelkamp eGrant.net.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but requires the eGrant.net Builder module at additional cost.
- **Supporting Data Collection for User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions. 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system can automatically generate a repayment schedule for PRIs through a separate product, at additional cost.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests/organizations/contacts to an accounting system.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this could be done using custom fields on in-system status messages to grantees.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments. The system creates payments in batch using the scheduling tool, but payment details can only be updated in batch through Microsoft Access's Find and Replace tool. The system can track the monetary value of in-kind and quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter only a single budget amount for your whole organization.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system has the ability to create grant requests based on budgeted line items in a proposal, using user-defined formulas.
- **Tracking Repayments for Program-Related Investments (PRIs)**: Support for interest repayments on PRIs is available through a separate product, at additional cost.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.

- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: There is no easy way to set reports to run automatically and send the results of a report to reviewers or users in the system.
- **Visual Reports**: The system provides the ability to create pie charts as a separate report type. Additional visualization is possible by exporting the report to Excel.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are available.
- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, such as the Foundation Center eReporting Excel format.

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, this 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 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. 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 of 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 with a "task list" when they sign onto the system.
- **Task Assignment**: Allows you to assign tasks to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members, but requires a module at additional cost.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices.

- **Grant Information Review from a Mobile Device**: Does not let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor reports that client data stored within the system and hosted on their servers (at an additional monthly fee) is protected with SSL security protocols, multiple firewall protections, and multi-site redundant backups.

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 Fields**: The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms using the eGrant.net 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.
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 they are viewing.
- **Optimization for Experts**: The system pulls together the information and actions an expert user is likely to need to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides phone support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Online Support**: Vendor provides email support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Manuals and Documentation**: The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.
- **Training**: The vendor provides initial training in person at the client site at no additional cost. More training in person or over the web can be scheduled at additional cost.
- **User Support Forums**: There are currently no support forums available for this system. The vendor reports that user support forums or discussion groups will be available in 2016.
- **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 it has about 220 clients. Breakdown by foundation type is 25% private, 25% family, 25% corporate, and 25% government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 15
- **Percent of Survey Respondants who Would Recommend the system**: 87 percent.
- **Training Score**: 1.16
- **Implementation Score**: 0.70
- **Support Score**: 1.41

FLUIDREVIEW

FluidReview is a configurable and polished online system with an emphasis on forms. The form builder is very flexible and easy to use, allowing users to drag and drop fields to add, remove, or rearrange application questions, with strong conditional logic for branching applications. Workflow is strong and rather straightforward to set up, as is application review. The vendor has made significant improvements to payment and budgeting functionality, and while email is fairly strong, users must create mail merges for letters or other print communications outside of the system. The vendor, Fluidware, was acquired by SurveyMonkey in 2014. A smaller foundation that awards about 10 grants per year may be able to get started with FluidReview for as little as $4,000, while a client with more advanced needs and larger grant programs may see annual costs up to $30,000.

- **Pricing (small org)**: First Year: $4,000 - $8,000
- **Pricing (small org)**: Annual Recurring: $4,000 - $8,000
- **Pricing (large org)**: First Year: $12000 - $30000
- **Pricing (large org)**: Annual Recurring: $12000 - $30000

Internal Tracking

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

Online Applications

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

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 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 are required.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The applicant has the ability to change their account information, user ID, and password, to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Applicants can easily see submitted applications and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that they can integrate the system with third-party databases to build applicant profiles.
- **Viewing Proposal 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 for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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 entered into text input fields is saved automatically and information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view applications at any stage in the process, but applications can only be printed by applicants after submission.
- **Preview Packet**: The system does not allow applicants to create a preview packet of their grant that includes uploaded documents. Applications can only be printed by applicants after submission.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet, using responsive design.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system. However, applicants will have to log-in from each funder's portal separately.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system. The vendor performs weekly scans of all documents uploaded to their servers.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry and flags those not listed.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.
- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. Individual emails can be edited after the batch is merged, prior to sending.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the delivery rate, error rate, and bounce rate for each email.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants, grantees, and reviewers.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, but they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization only as "members" on an application or proposal.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you automatically capture emails from an external email system without customization.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can configure the grantee profile to view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: Lets you configure a template of metrics to collect data based on grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests without the use of custom fields.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount and date paid.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement. However, this functionality is handled through the workflow functionality.

- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not currently support interest repayment on Program-Related Investments.
- **Payment Notes**: Can include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests/organizations/contacts to an accounting system.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: The system provides the ability to void or refund payments and make negative transactions. It's not possible to create payments or update payment details in batch, and in-kind and quid pro quo payments can only be tracked through custom fields.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make updates to standard reports—for example, to change the columns displayed, or the grouping—to meet different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and searches without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports if you include the correct filters when designing the report.

- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Reports can be set to automatically run and send the results to reviewers or users.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: The system does not, by default, contain report templates that align with sector-wide reporting standards.

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 system—for example, an admin 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 of the user who made the update, in an audit log. The vendor has made significant improvements to this functionality.
- **User Dashboards**: Provides "dashboard" views which summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users with a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users or applicants.
- **Board/Management View**: Provides a focused, roles-based view for management and board members, which can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Provides a responsive interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity and Security**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers, including geographically separate redundant data centers and nightly backups.

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 Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).

- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's possible for clients to define custom language sets for system navigation and menus, or create application forms in multiple languages.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 to minimize the number of steps and clicks they need to take.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support, Monday through Friday from 8:00-8:00 Eastern time, to the primary grants management contact without additional cost.
- **Online Support**: Vendor provides unlimited email and online support to the primary grants management contact without additional cost.
- **Manuals and Documentation**: The vendor provides help documentation online, including video tutorials and FAQs, as well as in-application help text.
- **Training**: The vendor provides initial training via the Internet at no additional cost and additional training sessions can be scheduled.
- **User Support Forums**: There are user support forums or discussion groups available.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The system has been in use by clients since 2008. In 2014, the vendor, Fluidware, was acquired by SurveyMonkey, which has been in business since 1999.
- **Client Base**: The vendor reports that it has about 600 clients. The vendor does not keep records of breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it. In 2014, Fluidware was acquired by SurveyMonkey.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 20
- **Percent of Survey Respondants who Would Recommend the system**: 90 percent.
- **Training Score**: 1.41
- **Implementation Score**: 1.67
- **Support Score**: 1.29

FLUXX

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as "dashboards" containing frequently viewed information. These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has added some new capabilities to let grantees manage their organization contacts in the system, the ability for new applicants to auto-fill their profile using GuideStar's Simplify Initiative, and support for grantees to manage all their grants for multiple funders in the system, through Grantseeker, a new standalone product. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Since the previous version of this report, the vendor now offers sophisticated reporting functionality for tracking outcomes data by grantee or program, although it's a standalone product called Impact Intelligence, which costs an additional $5,940 per year. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Pricing for the system is determined by multiple tiers, with differing levels of implementation and customization, starting at a flat fee of $5,940 per year for the Streamline tier for smaller organizations that do not require any custom build-out. Larger organizations, which require considerable build out, could pay up to $250,000 in the first year, with annual recurring costs starting at $50,000 per year.

- **Pricing (small org)**: First Year: $5,940
- **Pricing (small org)**: Annual Recurring: $5,940
- **Pricing (large org)**: First Year: $50,000 - $250,000
- **Pricing (large org)**: Annual Recurring: $7,500 - $50,000+

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations.
- **Splitting Categories**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs. The system is also tightly integrated with Google Drive and supports editing Google Doc attachments within the system. All files can be previewed directly within the system.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle. The system has the capability to perform a universal search, and preview records directly within the search results.
- **Handling Paper Applications**: Applications received as paper can be easily entered into the system without the need to log in as the applicant.

- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database. Optionally, files could be stored on a SharePoint server or on the client's file server with a link to it stored in the database. You can also attach Google Docs within the system.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is currently support for an hGrant feed within the system, and the vendor is working with partners including GuideStar and the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including eligibility quizzes, a Letter Of Intent stage, a more detailed proposal stage and, many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but there is a manual save option.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. Clients can opt for manual approval of registration requests or to allow applicants to register themselves.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applications can be viewed by applicants at any stage and applicants can toggle into a print view at any stage in the workflow.

- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Unified Accounts Across Grantmakers**: Applicants or grantees can manage all grant information for all of their funders in the system by using a single sign-on, and see the history of all applications they have submitted in the system, using Grantseeker, a standalone platform.
- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, allow a reviewer to comment or make suggestions, and then work back and forth until a proposal is complete on a field-by-field basis.
- **Security Scan for Uploaded Documents**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

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

Application Review

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

- **Comment Sharing Among Reviewers**: Lets you choose whether to let reviewers to see each other's comments and grades. You can also choose to keep all comments and grades anonymous, but still make them public to other reviewers.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score— and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either by alert within the system or via email based on configuration.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. The system uses GuideStar Charity Check. Provides updates based on the revocation list. The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself through Bridger Insight XG, a LexisNexis platform. The OFAC check includes date and time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch.
- **Manual Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself, through the Simplify Initiative.
- **Documentation for Organization Lookup**: The vendor provides documentation on how to set up the Simplify Initiative integration.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. MailChimp integration is available for bulk emails. MailChimp service requires an additional fee. Group emails are not sent as blind copies.
- **Email Template Flexibility**: Lets you create emails for individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. In order to edit an email after it's been merged, you would need to send it to Outlook first.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups, but not to automatically-generated emails.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email. You can also see the number of people who clicked on each link and bounce reports, but only for emails sent through MailChimp integration. MailChimp service requires an additional fee.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.

- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as well as schedule email reminders based on a variety of criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: Lets you spell check emails with a built-in, dedicated spell checker.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual no longer associated with a grant by "archiving" them for historical and audit purposes, and they will not show up as an active contact for communication.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the cc or bcc field.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Microsoft Exchange.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen. Additional outcomes analysis is possible through a separate product, Impact Intelligence, at additional cost.
- **Online Progress Report Submission**: Grantees can view their upcoming progress reports and due dates online through the grantee portal and track their own progress using the separate Impact Intelligence tool, at additional cost, but there is no way for grantees to publish or share those reports online.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines and pull field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.

- **User Groups**: You could configure the system to track user groups to collect uniform evaluation data by segmenting those groups and then tracking them through ad hoc reporting or a filtered card.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. The vendor offers a separate product, Impact Intelligence, that lets grantmakers perform sophisticated analysis of grantee and program outcomes, 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. This is done by allowing you to filter by whether a payment is actually due (due with no unmet requirements) or tentatively due (due but with unmet requirements)
- **Check Requests**: Can generate a paper check request for accounting and send requests to print checks to the accounting software packages with which the software integrates.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with the following accounting software packages: QuickBooks, Microsoft Great Plains, Intacct, and NetSuite.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for PRIs. As of the publication of this report, the vendor has launched an update to the system, which provides the ability to automatically generate a repayment schedule for PRIs.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you generate reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments and place payments on hold by creating statuses with workflows associated with them. There's no default ability to track quid pro quo and in-kind payments, although this could be tracked in custom

fields. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grant 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.
- **Basing Budgets on Past Years**: Does not let you base current years' budget on the previous year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to payments.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program and cycle, and view pre-packaged reports based on this customized set of grants. Also, data from filtered cards can be exported to Excel with one click.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, and queries without navigating a much larger set.
- **Saving Modified Reports**: Lets you name, save, and share ad hoc reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting. Users can define what fields are pulled into reports, and columns can be grouped and summed. Data within a filtered card can be exported to Excel and Fluxx users can define which fields are populated on that spreadsheet (and in which order).
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down on some reports, depending on the type.
- **Attachment Searching**: Lets you search within attached documents.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard and users can monitor indicators personalized to them.
- **Industry-Standard Reporting Templates**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI. The system also has the ability to pull in data feeds from external sources, such as the World Bank or U.S. Census.

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

Data Access

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

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Lets you create unlimited custom fields within the system that have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out.
- **Intuitive Labels**: On the core interface pages, the user can easily find the actions he or she is most likely to take. The user interface is configured to meet the specific needs of the client.

- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take, though the navigation scheme is unique. Users who are familiar with other grants management systems may require substantial training.
- **Optimization for Experts**: The system pulls together the information and actions an expert user is likely to need so as to minimize the number of steps and clicks needed.

Support and Training

- **Phone Support**: Phone support to end users is included in support and maintenance fees.
- **Online Support**: Fluxx's support team is available via email and there is a support portal using Zendesk.
- **Manuals and Documentation**: The vendor provides detailed documentation, including training videos, through an online Knowledge Base at fluxx.io/knowledge. Detailed help documentation is also available through the system.
- **Training**: Fluxx Labs provides initial training, which is covered by the implementation fee. Ongoing training is provided online through weekly webinars at no additional cost. Additionally, the vendor can provide customized, on-demand training, at additional cost.
- **User Support Forums**: The vendor provides a community user forum online at community.fluxx.io.

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 Fluxx project has been in existence since 2005. FluxxLabs (the organization that provides Fluxx support and training) has been in operation since 2010. Fluxx has been in use by clients since 2010.
- **Client Base**: The vendor reports that it has about 200 clients. Breakdown by foundation type is 50% private and family, 15% corporate, 20% government and medical, and 15% nonprofit.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 30
- **Percent of Survey Respondants who Would Recommend the system**: 80 percent.
- **Training Score**: 1.15
- **Implementation Score**: 1.14
- **Support Score**: 1.14

FOUNDANT GRANT LIFECYLE MANAGER

Foundant Grant Lifecycle Manager is a polished, friendly, and quickly growing low-cost grants 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 doesn't support branching for applications or data collection. Recent improvements to payments and budgeting allow you to set budget amounts by program area and automatically generate a repayment schedule for program-related investments (PRIs). The system does not allow users to define their own user roles or integrate with third-party systems via an Application Programming Interface (API). It does, however, allow you to export most visible data from the system. Foundant is very reasonably priced, at $7,500 for a two-year license, which includes support, and $1,500 for a one-time setup cost.

- **Pricing (small org)**: First Year: $4,750
- **Pricing (small org)**: Annual Recurring: $3,250
- **Pricing (large org)**: First Year: $7,500
- **Pricing (large org)**: Annual Recurring: $6,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations.
- **Splitting Categories**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs. Images can be converted to .PDFs, but audio and video attachments must be downloaded separately.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program, workflow stage, date, and grant cycle.
- **Handling Paper Applications**: Applications received as paper can be entered into the system easily by entering them as a new request or appending an existing 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 to Grant Records**: Lets you approve or deny applications and generate merged letters and emails in batch, but not update defined coding and other fields.
- **Support for Industry Taxonomy**: The vendor is working with partners including GuideStar and the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

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

- **Creating Online Applications**: Lets you create new online applications with file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: There's no eligibility quiz available in the system.
- **Application Branching**: Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 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 multiple review stages.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: A new organization view supports multiple grantee logins.
- **Transfer of Account and History**: It's not possible for a grantseeker to transfer their account and history to another persion within that organization. The Foundation Administrator can make the transfer on the back end.
- **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.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you send an automatic confirmation to a grantee upon submission of an application.
- **Application Formatting**: Allows grantmakers to format applications using groups of questions and rich text, but not multiple pages.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Duplicate Accounts**: The system checks the email address and EIN of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: Applicants or grantees can manage all grant information for all of their funders in a separate product, GrantHub, at extra cost.
- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, get comments or suggestions from a grantmaking staffer, and work back and forth until a proposal is complete on a field-by-field basis.
- **Security Scan for Uploaded Documents**: The system does not allow files with any executable-related file extension (.exe, .bat, etc.) file extension to be uploaded for security purposes. The system also offers security scan at the point of download.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Look and feel customization is typically performed by the vendor during initial setup.

- **Character and Word Counts**: The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes in-system help configured by the vendor to be personalized to the foundation's particular needs.

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. This system includes a fully integrated version of GuideStar Charity Check and verifications are stored in the database for future audit purposes. It's not possible to perform checks & updates in batch.
- **OFAC Status Checking**: Lets you compare organizations, but not individuals, against standard OFAC and other terrorist watch lists within the grants management system itself, via GuideStar integration. It's not possible to perform checks & updates in batch.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself, through the Simplify Initiative.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor provides in-system documentation for users showing how to access GuideStar data in the system through the Simplify Initiative, and how to export the necessary grants data to share with Foundation Center.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent via blind copies, but rather individually to minimize the risk of being flagged as spam.
- **Email Template Flexibility**: Lets you create an unlimited number of email templates that include both standard text and a limited number of "mail-merge" fields, including applicant name and contact information.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on a limited number of certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Organization information is saved within the system, and you can view and report on the history of all grants to a particular organization.
- **Tracking Hierarchical Business Units**: Lets you track individual business units under a larger organization with some modifications.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you or to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, to send the payment letter to the payment contact or email a reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated emails for each grant. Users can choose whether or not to automatically attach mail-merged letters to the request record.
- **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 & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: It's not possible to "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen by generating a report.
- **Online Progress Report Submission**: Grantees can view their upcoming progress reports and due dates online through the grantee portal, and submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines. Reminder emails can include a limited number of "mail-merge" fields, including applicant name and contact information.
- **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.
- **Creating Online Progress Report Forms**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Supporting Data Collection for User Groups**: The system can support user groups to collect uniform data for evaluation purposes through a variety of means, including internal evaluation templates, required fields, and ad hoc reporting.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

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. Lets you define multiple payment schedules for grants by type (e.g., installment plan, single-payment, matching payments).
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but not print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors) through 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.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor reports that this feature is forthcoming.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in U.S. dollars.

- **Multi-Currency Reporting**: Does not let you report on grants made in other currencies.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but the system only flags contingencies rather than enforcing them.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information. Payment controls can be set by user role.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system can automatically generate a repayment schedule for PRIs using the same scheduling functionality as for payments.
- **Payment Notes**: It's possible to add a comment on a note.
- **Payment Reporting**: Lets you pull reports on payments that carry the coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: To void payments or put them on hold, you would need to create a custom status. To refund payments, you would need to create a negative payment amount. It's not possible to create or update payments in batch or track quid pro quo or in-kind payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter 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.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year by copying and renaming an existing budget.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes, although this could potentially be managed through a custom report.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to disbursements.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayment on Program-Related Investments.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users.
- **Grant Summary Tracking**: You can define codes and see them in reports, and these codes can be rolled up hierarchically—for example, to show grant money paid to each education sub-program as well as total education grants—by creating hierarchies within groups.

- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Lets you setup reports to automatically run, but not be sent out to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as a chart or graph.
- **User Dashboards**: The system does not provide "dashboard" views that summarize the grants currently relevant to each individual user, or have the ability for users to create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system contains a standard report template to easily align data with the Foundation Center eReporting format.

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**: The vendor can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces**: Provides a different internal interface to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each user role, but not customized to the individual user account.
- **Users Task Lists**: Does not provide users a task list upon sign on.
- **Task Assignment**: Lets you assign reviews to users within the system, but no other tasks.
- **Board/Management View**: Provides a standard, focused, roles-based view for board evaluators, but not for management.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: Lets you export virtually 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.
- **Reviewing Applications from a Mobile Device**: Provides a responsive interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor's security protocols include vulnerability testing, a redundant server replicated in real time, real-time backup, strict firewalls, and a hosting provider that is SSAE16 compliant.

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 Fields**: The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields, but there isn't an audit log of changes.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost, including visual design aspects.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.

- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor does not provide extensively customized solutions.
- **Support for Multiple Languages**: Lets you define custom language sets for applicants and reviewers based on user, group, or giving program.
- **Customization by Foundation Staff**: Most configuration or customization as described above can be performed by the user, without involvement from the vendor. Vendor involvement is required to define user roles and account types, and to set user permissions by the field-level.

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 without additional cost.
- **Online Support**: Vendor provides email support without additional cost, as well as an online knowledgebase and customer community that is searchable.
- **Manuals and Documentation**: Vendor provides online documentation, contextual help, and tutorials for board, applicants, and staff reviewers.
- **Training**: The vendor provides initial training via the phone and web demos included in the one-time setup fee. Through a series of online meetings, trainers teach a system administrator how to set up online data collection forms. Ongoing online training geared to new users is provided at no additional cost and includes written and video tutorials. In-person sessions can be scheduled for an additional fee. The vendor also offers a free two-day training session six times per year at its Bozeman, Montana location.
- **User Support Forums**: User support forums and discussion groups are available, including the Idea Lab, where clients can post product suggestions. The vendor offers a national users conference and has active local users groups in 22 regions.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since January 2006. Grant Lifecycle Manager has been in use since February 2007.
- **Client Base**: The vendor reports that it has about 902 clients. Breakdown by foundation type is 40% private, 20% community, 10% arts and humanities, 10% government, 10% corporate, 5% medical research, and 5% other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 414
- **Percent of Survey Respondants who Would Recommend the system**: 99 percent.
- **Training Score**: 1.63
- **Implementation Score**: 1.39
- **Support Score**: 1.67

FOUNDATIONCONNECT

foundationConnect is an online hosted solution built on top of the Salesforce platform. The vendor, roundCorner, is a privately held for-profit company, but the platform was originally created by the grantseeking nonprofit NPower. The system capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers and management to see only the information relevant to them. Grantees and external reviewers log in through a separate-but-tightly-integrated portal built on Salesforce Communities. Users will want to visit the Salesforce AppExchange to add third-party add-ons—such as Conga Composer or LOOP Document Services—for mail-merge and template capability. Email sent from foundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but is limited to 1,000 emails per day, and users can easily attach emails generated outside the system to a grantee's record. Many broadcast email programs, such as Vertical Response and Team Approach, also integrate tightly with Salesforce, while a free connector lets users log email sent from Outlook and synchronizes their contacts with the system. roundCorner, Inc. acquired the foundationConnect product and their team of experts from NPower in 2014. The initial setup cost for foundationConnect ranges from $25,000 for small foundations to $40,000 for larger foundations, with maintenance and support ranging from $7,200 to $14,400 and up per year. The Salesforce license is free for nonprofits for up to 10 user licenses, and costs $432 per license per year on top of that.

- **Pricing (small org)**: First Year: $25,000 – $35,000
- **Pricing (small org)**: Annual Recurring: $7,500 – $15,000
- **Pricing (large org)**: First Year: $45,000 – $100,000
- **Pricing (large org)**: Annual Recurring: $25,000 – $65,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: You can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations if you adjust these in the payment schedule.
- **Splitting Categories**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you easily update basic grant information like project names or codes throughout the process. Custom codes can be created as needed.
- **Updating Basic Grant Information**: Lets you easily update basic grant information.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle. The system has the capability to perform a universal search.
- **Handling Paper Applications**: Applications received as paper can be entered into the system easily by entering them as a new application.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links. The system can also be customized to store attachments as links. The system has added the ability to index and version attachments.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.

- **Support for Industry Taxonomy**: The vendor is working with partners including the Foundation Center to implement a universal taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create an unlimited number of different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications with some vendor configuration.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations—but only by clicking a link or by spitting the application into multiple tabs. System does not currently support branching based on values entered in a field.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: A grantee or applicant cannot transfer his or her account and history to a new staff contact from the front-facing interface, but the foundation can transfer applications.
- **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.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative.
- **Viewing Proposal 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 for Online Applications**: 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 the system warns you to save manually before moving to a new tab in the application form, and will save immediately prior to session timeout.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.

- **Unified Accounts Across Grantmakers**: The system does not support the ability for applicants or grantees to manage all grant information for all funders in the system using a single logon.
- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, get comments or suggestions from reviewers, and work back and forth until a proposal is complete, on a field-by-field basis. It is possible to configure Salesforce Chatter to enable real-time discussions between grantees and reviewers within the application itself.
- **Security Scan for Uploaded Documents**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

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

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had 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**: By default, external and internal reviewers can only print a single application at a time. It is possible to print multiple grant summaries and attachments with the configuration of add on components such as Conga Composer, LOOP Document Services, or another Salesforce app at additional cost. You can sort and filter by program and date.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily. Reviewers can upload attachments. It is not possible to view the application and feedback form side by side on the same screen.
- **Viewing files**: Reviewers must manually open documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. The system uses the Salesforce workflow functionality.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different and customizable information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest through a custom form and use those criteria to assign applications for review. Lets you track reviewers and applications by geography or other criteria defined by grantmaker for making assignments. You cannot currently save review panels or assign reviewers to requests in batch.
- **Comment Sharing Among Reviewers**: The reviewer portal can be customized to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.

- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either by alert within the system or via email based on configuration.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employer Identification Numbers against the current version of the IRS Master Business File and Publication 78 Database, and flags those not listed. The tax status automatic check includes auto population of related fields for legal name, EIN and tax status, and includes date and time stamp which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch with additional configuration.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. The OFAC check includes date and time stamp which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch with additional configuration.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself, through the Simplify Initiative.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor provides documentation showing users how to access GuideStar data in the system through the Simplify Initiative, as part of the user support community. Foundation staff can also add in-system help text.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include, but an add-on such as Conga is required to customize fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that includes mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. This functionality requires a third-party Salesforce app such as Conga Composer or LOOP Document Services, potentially 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. This functionality requires a third-party Salesforce app such as Conga Composer or LOOP Document Services at additional cost.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them. This functionality may require a third-party Salesforce app such as Conga Composer or LOOP Document Services at additional cost.
- **Board Docket Attachments**: Lets you attach documents to board dockets, but requires a third-party Salesforce app such as Conga Composer or LOOP Document Services at additional cost.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process, but requires an external app for the Salesforce process.
- **Electronic Templates**: Includes templates for print and electronic formats. Sophisticated templates may require a third-party Salesforce app such as Conga Composer or LOOP Document Services 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 1,000 emails per day within the system. Higher volumes can be supported via add-on modules such as VerticalResponse or Team Approach, possibly at additional cost.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, but you must set up the template beforehand rather than inserting merge fields into an ad hoc email message. You can't edit emails on an individual basis after they have been merged.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.

- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email. You can also view the number of people who clicked on each link and bounce reports, butthis requires a module at no additional cost for up to 10,000 emails per month. Additional fees apply after the monthly limit is reached. Higher volumes can be supported via add-on modules such as VerticalResponse or Team Approach, possibly at additional cost.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees, as well as on a variety of other criteria.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam. Salesforce caps outbound at 1,000 emails per day. Higher volumes can be supported via add-on modules which integrate tightly with Salesforce, such as Vertical Response, iContact, and MailChimp, possibly at additional cost.
- **Spell Checking for System-Generated Email**: Lets you spell check emails within the system.

Relationship Management

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

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee, but cannot set up a default set of requirements that applies to all grants without configuration. Grantees and applicants have the ability to propose and define grant requirements online.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant, through customization.
- **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.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen by running a report.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields on the grantee portal, which you can then summarize across grantees in reports.

- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines and pull merge field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The system includes some basic standard formats.
- **Supporting Data Collection for User Groups**: Lets you track evaluation metrics by collecting uniform evaluation data across program as well as individual grant-specific evaluation criteria.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule, including multiple payments, for each individual grant, but does not easily allow you to create a default payment schedule for all grants. A default payment schedule can be customized by vendor during implementation.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. It's not possible to print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports the tracking of information about ACH payments and wire transfers, but to process payments, you would need to integrate the system with your accounting system or a payment gateway.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number, either by integrating with your accounting system or through manual entry.
- **Accounting Integration**: The vendor has integrated multiple accounting systems, at additional cost, by leveraging a Salesforce API that provides easy linkage to financial systems.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information, but requires some system configuration at no additional cost.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency, but requires some system configuration at no additional cost.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The vendor can configure the system to track interest repayment on PRIs, at additional cost.
- **Payment Notes**: Lets you include notes on payments, which can be private to certain users or usable for all.

- **Payment Reporting**: Lets you generate reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Lets you configure the grantee portal so grantees can view the payment schedule for their award(s) online. The schedule can display both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments and place payments on hold by creating statuses with workflows associated with them. There's no default ability to track quid pro quo and in kind payments, although this could be tracked in custom fields. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, actions, and queries without navigating to 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, and grouping, but a third-party add-on such as Conga Composer must be used to include logos and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search for attachments and the contents of file attachments.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation, e.g., charts, graphs, and maps.

- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard, and users can monitor indicators personalized to them.
- **Industry-Standard Reporting Templates**: Includes guide for producing reports that easily align data with reporting standards used by the sector, including the Foundation Center's eGrant and hGrant formats, and includes substantial ability to pull in data feeds from external sources through the comparative grants API.

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. Narrative text fields can be configured to be tracked and audited.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device. This can be accomplished either through the Salesforce1 mobile app for iOS or Android devices, or through the responsive Lightning interface.
- **Grant Information Review from a Mobile Device**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device. This can be accomplished either through the Salesforce1 mobile app for iOS or Android devices, or through the responsive Lightning interface.
- **Data Integrity and Security**: All data is hosted by Salesforce.com, which provides robust, multi-layered protections to ensure data confidentiality and integrity (more detail available here: http://trust.salesforce.com/trust/security/).

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Lets you create custom fields within the system that have the same permissions as system-standard fields. You can track the creation and change of custom fields for historical documentation in an audit log.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor or vendor partner will extensively customize system to your needs at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database (as allowed through the API). The underlying Salesforce platform permits clients to extend system functionality via access to underlying database and code (as allowed through the API).

- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Virtually all configuration or customization as described above can be performed by an admin user without involvement from the vendor. However, most users will want to work with the vendor or implementation partner for more extensive customization.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out. Salesforce's new Lightning interface provides a more polished and mobile-responsive alternative to the classic view.
- **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 support, but it costs extra. Additionally, Salesforce provides 24/7 support that can be helpful in some cases.
- **Online Support**: Vendor provides unlimited online or chat support, with bug reporting and access to the online knowledge base and customer community, without additional cost. Additional support tiers provide technical assistance, how-to information, and general question and knowledge transfer, at additional cost.
- **Manuals and Documentation**: The system provides an extensive library of articles and guides through the online customer community, including information on resolved issues, release notes, guides to updates, feature configuration, and general technical documentation.
- **Training**: The implementation vendor provides training as part of the implementation project at an additional cost. Additional training with implementation vendor or roundCorner can be scheduled at additional cost.
- **User Support Forums**: The vendor provides an online customer community with manuals, documentation, user forums, and in-person meetings. Additional user support forums and discussion groups for the Salesforce platform itself are available through the Power of Us Hub at powerofus.force.com.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: roundCorner was founded in 2009 and provides Salesforce-based solutions for the nonprofits sector. foundationConnect was acquired from NPower in 2014, and roundCorner has invested significantly to evolve the product since that time.
- **Client Base**: The vendor reports that it has about 90 clients. Breakdown by foundation type is 50% private foundations, 20% family foundations, 10% community foundations, 15% government, and 20% other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 39
- **Percent of Survey Respondants who Would Recommend the system**: 90 percent.
- **Training Score**: 0.75
- **Implementation Score**: 0.91
- **Support Score**: 1.20

GEMS

Mosaic's suite of software—which includes GEMS, STARS, and other customized implementations—is designed to support many facets of the human services sector besides grants management, and provides powerful capabilities in the realm of grant evaluation and contract-based budgeting. The system is used predominantly by government agencies throughout the United States, and in 29 countries in the developing world. The vendor provides consulting services and highly customized implementations for its customers to help connect grants and improve outcomes with an organization's grantees. The software has a unique means of personalizing the interface, and it's easy to turn features and whole areas of the system on and off. While the system doesn't support merged letters or emails, GEMS plays to its strengths—specifically, the online application functionality and the robust, dedicated support for progress reports and outcomes tracking, which allows users to view progress by indicators, by individual grantee, or in aggregate, through a wizard-style interface. The system does not include a means of checking tax or OFAC status, although the vendor is willing to add such features during implementation. Support options—both online and phone—are also quite extensive. For a small foundation, the estimated cost for implementation plus the first-year license and support costs would be approximately $32,000, with a lower ongoing annual cost for maintenance and support. For a larger foundation, the estimated cost for implementation plus the first year license and support costs would be approximately $155,000, with a lower ongoing annual cost for maintenance and support.

- **Pricing (small org)**: First Year: $32,000.00
- **Pricing (small org)**: Annual Recurring: Varies
- **Pricing (large org)**: First Year: $155,000.00
- **Pricing (large org)**: Annual Recurring: Varies

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Grant information cannot be tracked by program cycle or board meeting date, but information about either could be tracked by creating dates within the system calendar.
- **Tracking by Categories and Codes**: You can track by categories, such as geographic or population-based codes, with specific percent or dollar allocations, but the system would require some customization to do so.
- **Splitting Categories**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, and program and grant cycle.
- **Handling Paper Applications**: Applications received as paper can be entered into the system by scanning the application and uploading the .PDF as a document-upload data field, which would still enable the review workflow, or else by having a grantmaker log in as a grantee to input the information.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates to Grant Records**: Does not easily let you perform batch updates of defined coding and other fields.

- **Support for Industry Taxonomy**: There's not currently support for an industry-standard taxonomy within the system, but the vendor would be willing to build one upon request.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

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

- **Collaboration Between Grantseeker and Funding Organization**: The system does not currently have the ability to let applicants work on a proposal, submit, and get comments and suggestions from a reviewer, and then work back and forth until a proposal is complete, after which the proposal is locked. However, the vendor reports that this could be customized.
- **Security Scan for Uploaded Documents**: The system does not have a virus scan or security feature to prevent malicious files from being uploaded into an application or downloaded into the system, but this could be facilitated by adding a virus scanner to the document management system through the API.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status, though the vendor is willing to build integrations to do so.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists, though the vendor is willing to build integrations to do so.
- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.

- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

- **Default Print Format**: Does not support printed summaries of grant applications.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: You cannot view or customize individual letters within the system before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not currently support electronic signatures.
- **Electronic Templates**: Does not include templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria through an internal communications log for users of the system.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method**: There's no in-system email.
- **Spell Checking for System-Generated Email**: There's no in-system email.

Relationship Management

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

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements for each program and customize them for individual grantees.
- **Branching for Evaluation**: Lets you branch data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, which they have not, and compare them to logic models.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: Lets you maintain user groups within the system in order to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is done through a dedicated outcomes module, with a wizard-style interface to view progress on specific indicators over time.

Payments

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

- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: Lets you include notes on payments
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The system is designed to make running reports easy enough for casual users to run queries independently. GEMS has its own reporting engine.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, date, or program, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents, but does provide a robust document management system to help manage attachments.
- **Automating Reports**: It's not possible for reports to be set to automatically run and send to individuals or groups
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation, e.g., charts, graphs, and maps.

- **User Dashboards**: The system provides "dashboard" views that summarize the grants currently relevant to each individual user and offers the ability for users to create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, or IATI.

Roles and Permissions

- **Permissions Granularity**: You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions. You can also assign users to specific programs.
- **Field-Level Permissions**: It 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 system—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the information currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members, although one could be configured.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices, but the system interface is mobile responsive.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device, but the system interface is mobile responsive.
- **Data Integrity and Security**: The vendor's security protocols include a redundant network of servers, replicated in real-time; daily backup; substantial activity logs and audit trails; firewalls for both application and database serves; encryption for sensitive data; and isolated session containers.

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

- **Customization by Foundation Staff**: Virtually all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 must look through a considerable list of options to find them.
- **Optimization for Experts**: An expert user will need more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides user support and data coaching to all users via toll-free helpline (in addition to online support options detailed below). Support is available between 6am PT – 6pm PT on regular business days. For emergencies, all systems are also supported by a 24-hour emergency support line.
- **Online Support**: Vendor provides user support and data coaching to all users via e-mail, online chat, and remote desktop technology. Support is available between 6am PT – 6pm PT on regular business days. Each system has a help section dedicated to providing support that provides an email address for specific questions and an online form to submit inquiries. In addition, the vendor provides live, remote assistance through an instant chat function, which is accessible to users directly through the system.
- **Manuals and Documentation**: The vendor typically provides manuals designed for each user type, including easy-to-understand text and images. These manuals are available online through a wiki-style online manual platform and are integrated in the system. Video trainings designed for each user type that, similar to manuals, are available online using a professional video hosting site and are integrated in the system. The vendor also provides cheat sheets and quick guides.
- **Training**: The vendor provides initial in-person live training sessions during the release of the system for all user types across agencies. When major updates are introduced in the system, additional in-person trainings are scheduled. Additionally, they offer remote training via webinar, specifically designed for a specific user type, function, or task, and when updates and new features are added, additional remote trainings are offered, tailored to their clients needs.
- **User Support Forums**: There are currently no user support forums or discussion groups.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

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

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

GIFTS ONLINE

Acquired by Blackbaud in 2014, GIFTS Online is a fully web-accessible, online hosted entry into the grants management arena that offers many of the strengths of MicroEdge's legacy installed products GIFTS and GIFTS Alta. It's fully loaded with optional modules, and its strong suits are tracking grant information, mail merging, and application review. Since we last saw the system, the vendor has added new modules with support for tracking grantee outcomes and scholarships. GIFTS Online can offer customized views per user and per role, including customizable user dashboards and online forms. The vendor offers tiered pricing for the system, based on the number of users and modules—an entry-level client could acquire GIFTS Online for about $3,900 per year, while a very large foundation could expect to pay around $42,477 per year.

- **Pricing (small org)**: First Year: $3,900
- **Pricing (small org)**: Annual Recurring: $3,900
- **Pricing (large org)**: First Year:
- **Pricing (large org)**: Annual Recurring:

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and track the specific percent or dollar allocations for each.
- **Splitting Categories**: It's possible to split grants by custom categorization codes if you configure the system to allow multiple codes per grant.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: 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 as paper can be entered into the system easily 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 to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The system has support for the NTEE syntax within the system and the vendor is willing to work with clients and the Foundation Center to incorporate other taxonomies into the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program. The vendor has added substantial support for scholarships beyond the scope of this review.

- **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.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: The system allows for eligibility quizzes that can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **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.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required. The data is brought automatically into a staging area in the core system, where it can be reviewed by an administrator and either promoted into the database or declined.
- **Multiple Logins for Grantees**: Supports only one grantee login per grant application, but the original applicant can share the application with anyone they choose via email to view the application, transfer ownership of the application, and make edits to the application or reporting requirements.
- **Transfer of Account and History**: The grantee or applicant and the GIFTS Online administrator can transfer their account and history to new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the web interface.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages. The system also accommodates video and formatting in HTML and XML.
- **Spell Checking for Online Applications**: Grantees can easily spell check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Applicants and the grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Application forms are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Possible duplicates are flagged for the grantmaker to choose whether to create a new account, merge with an existing account, or reject it.
- **Unified Accounts Across Grantmakers**: Grantees have separate accounts for each grantmaker using the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows the grantee to work on a proposal, save it as a draft, get comments or suggestions from the reviewer, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: The system performs a virus scan to prevent malicious files from being uploaded. The vendor also enlists a third party to perform periodic vulnerability tests.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. The system includes the ability to do advanced online form design, such as HTML, columns, and vanity URLs.
- **Character and Word Counts**: The system includes word counts for application questions, which can be set and adjusted by a staff user for any field, but does not include character counts.
- **In-System Help for Applicants**: Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms.

Application Review

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

501(c)(3) and OFAC Status

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

- **Documentation for Organization Lookup and Data Initiatives**: The vendor provides documentation on how to access GuideStar data from the system and how to set up the Simplify Initiative integration. The vendor provides documentation showing clients how to export the necessary grants data with the Foundation Center.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Can set send criteria to communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact).

- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records through an integration with Microsoft Outlook. Users can select emails within Outlook to send to the system.
- **Contact Synchronization**: Does not automatically synchronize contacts with Outlook. Users can manually export contacts from the system for import into Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by program and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. Reminder email templates can include merge field info from the requirement.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system has the ability to configure a template of metrics to collect data based on grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is done through the new Outcomes module, which aggregates grantee outcomes across all funders in the system, allowing foundation staff to compare program outcomes to national benchmarks.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting. You can print checks directly from the system through a Checkwriter functionality, or if integrated with an accounting system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with several external accounting packages. Many major packages are supported and the vendor could build integration for other packages at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in U.S. dollars, British pounds, or Australian dollars. It is possible to track exchange rate information through custom fields. The vendor reports that additional support for grants made in other currencies will be available in July 2016.
- **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 these permissions are configured by the vendor during implementation.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: It's possible to pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: The system has the ability to void, refund, or hold payments, and create payments in batch. The system has the ability to track in-kind and quid pro quo payments tracked separately from payments.

Budgeting

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

System Querying and Reporting

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

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 that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: 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. The vendor reports that an API for the system will be available in July 2016.
- **Reviewing Applications from a Mobile Device**: Provides an interface specifically designed to see, code, approve, and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device**: Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor provides robust documentation regarding its security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: The system includes unlimited custom fields and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so. Customization is considered on an individual basis, and there is the possibility that these customizations will be added to the core code base and made available for all clients. The system allows for personalization of the system done by the end user.
- **System Extendibility** : Vendor does not currently allow clients access to database and code to extend system functionality. The vendor reports that an API for the system will be available in July 2016.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration as described above can be performed by the user, without involvement from the vendor.

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 vendor provides unlimited phone support, Monday through Friday from 8:00-8:00 Eastern time, as part of the yearly maintenance fee.
- **Online Support**: The vendor provides unlimited email support as part of the yearly maintenance fee and offers a client portal that includes training articles and video-based training on specific tasks and topics. Monthly online webinars are also offered.

- **Manuals and Documentation**: The vendor provides manuals and documentation for the system, including training videos, through the Community Portal, the vendor's online knowledgebase.
- **Training**: The vendor provides initial training in person or via the Internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: User support forums or discussion groups are available in the Blackbaud user community.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 1985; GIFTS Online has been in use since 2009. MicroEdge was acquired by Blackbaud in 2014.
- **Client Base**: The vendor reports that it has about 720 organizations currently using GIFTS Online. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 34
- **Percent of Survey Respondants who Would Recommend the system**: 71 percent.
- **Training Score**: 1.02
- **Implementation Score**: 0.96
- **Support Score**: 0.92

GIVINGDATA

Originally developed as a business intelligence and analytics reporting tool to integrate with MicroEdge GIFTS, GivingData is a new entrant into the grants management market, launching as a full lifecycle GMS in January 2016. As a result of this pedigree, the system's reporting functionality is strong, with visualizations such as charts and graphs and the ability to drill down into report results for more detail. The reporting engine also supports other sections of system functionality, including budgeting. A dedicated assessment module provides support for tracking grantee progress toward program goals. Unlike other systems in this report, the evaluation functionality is designed to be used by foundation staff directly (e.g., to record observations from site visits, reports, and evaluations) for individual grantees. At this point, there is no ability for grantees to submit progress reports online, and foundation staff cannot currently view outcomes data in aggregate across all grantees, but the vendor reports that these features will be available as of Q2 of 2016. The relative infancy of GivingData is most apparent in the functionality not present at release—currently there is no support in the system for grantees to apply for grants through online application forms, and compared to other systems in the report, support for relationship management is minimal. Pricing for the system is an annual subscription fee based on the number of users, starting at $6,000 per year for the core grants management functionality for up to 10 users, with additional fees for the assessment module, technical support, and professional services related to implementation.

- **Pricing (small org)**: First Year: $6,000.00
- **Pricing (small org)**: Annual Recurring: $6,000.00
- **Pricing (large org)**: First Year: $17,400.00
- **Pricing (large org)**: Annual Recurring: $17,400.00

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocations.
- **Splitting Categories**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: 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 as paper can be entered into the system by creating a new grant record and uploading the relevant documents.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links, through integration with Microsoft OneDrive for Business.
- **Batch Updates to Grant Records**: Does not easily let you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The system supports the NTEE standard taxonomy as well as the Philanthropy Classification System. The client can define the keywords and categories to match any additional standard taxonomies they desire.

- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Number of Online Application Forms**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Eligibility Branching**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Application Branching**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Support for Multiple Stages**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Online Application Integration**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Multiple Logins for Grantees**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Transfer of Account and History**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Reuse of Application Data**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Application Autofill from Tax Record**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Viewing Proposal Status Online**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Custom Confirmation Messages**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Application Formatting**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Spell Checking for Online Applications**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Saving Incomplete Applications**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Application Auto-Saving**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **User Registration**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Lost Credentials**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Viewing Applications**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Preview Packet**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Mobile Device Application Access**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.

- **Duplicate Accounts**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Unified Accounts Across Grantmakers**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Collaboration Between Grantseeker and Funding Organization**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

- **Look and Feel**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Character and Word Counts**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **In-System Help for Applicants**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Reopening Submitted Applications**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Reviewers must navigate the full grants management interface to see and review grant applications.
- **Viewing files**: Reviewers can easily view uploaded documents associated with the request and stored in the system through integration with Microsoft Office365.
- **Grant Review Workflows**: Does not currently let you define automatic steps and rules for the grants review process. The vendor reports that this functionality will be available by Q4 of 2016.
- **Multiple Reviewer Support**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **Scoring Flexibility**: The system does not support scoring schemes for application review by default, but the vendor reports that the Monitoring & Assessment module could be used for this purpose.
- **Online Application Review**: Does not currently support online applications. The vendor reports that support for online applications will be available by Q4 of 2016.
- **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**: You cannot currently report on numeric review scores 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**: 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**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.

- **Manual Organization Lookup Through GuideStar**: Lets you manually access GuideStar data for organizations within the system itself, through Charity Check.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor does not provide documentation showing how to manually look up GuideStar data.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.
- **Mail-Merge Fields in Letter Templates**: 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 fonts, colors, and logos.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system does not provide support for electronic signatures to provide independent secure verification.
- **Electronic Templates**: Includes templates for print and electronic formats. Tablets are supported through the responsive interface. Currently, the vendor can create these templates upon request.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual, but not to a group of people at once, by connecting to your organization's email client.
- **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.
- **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.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact or email reporting reminder to report contact).
- **Record of Correspondence**: Does not store any record of system-generated email or letters. Users can manually attach or upload emails or letters to the relevant grantee record.

- **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. The vendor reports that this functionality will be available as of Q1 2017.
- **Email Capture**: Does not let you capture emails from an external email system automatically. The vendor reports that this is possible for those clients using the system in conjunction with MicroEdge GIFTS.
- **Contact Synchronization**: Does not automatically synchronize contacts with Outlook, but users can manually download and import contact records.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, but cannot set up any default set of requirements that applies to all grants.
- **Branching for Evaluation**: Data collection forms cannot "branch" based on the type of grant.
- **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.
- **Tracking Individual Grantee Outcomes**: Foundation staff can view both outcome goals and actuals for an individual grantee on the same screen, and record both qualitative scores and narrative comments for each assessment.
- **Online Progress Report Submission**: Grantees cannot submit progress report information online.
- **Deadline Reminder Emails**: Cannot automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Grantees cannot submit progress report information online.
- **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.
- **Creating Online Progress Report Forms**: Does not let you create online progress report forms.
- **Supporting Data Collection for User Groups**: The system can support user groups to collect uniform data for evaluation purposes through help-text and instructions on assessment forms.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress towards those goals using completed assessments. The system provides a dedicated module for this purpose, which allows foundation staff to record grantee progress toward stated goals, with narrative comments, and reports on outcomes year-to-year. This functionality is designed to be completed by foundation staff in tandem with site visits or other formal assessments, rather than by the grantees. The system does not currently support viewing progress across multiple grantees. The vendor reports that this functionality will be available in Q3 of 2016.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not currently support ACH payments and wire transfers. The vendor reports that this functionality will be available in May 2016.
- **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 currently support an automated payment approval process. The vendor reports that this will be available by Q2 of 2016.
- **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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on PRIs without integration with a third-party accounting system.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this will be available by the end of 2016.
- **Other Payment Issues**: The system provides the ability to void, refund, or place holds on payments in the system. Users cannot create payments in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: Does not let you base current years' budget on the previous year, but can view giving trends over time by giving program or fund.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios at the grant level, and see how those changes will affect the annual budget.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on PRIs without integration with a third-party accounting system.

System Querying and Reporting

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

- **Saving Modified Reports**: Lets you save specific searches and dashboard configurations, but otherwise does not let you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers. The vendor reports that this may require custom development, potentially at additional cost.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups. The vendor reports that this may require custom development, potentially at additional cost.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center Reporting Commitment hGrant format.

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 system—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Does not currently provide users a task list upon sign on. The vendor reports that this will be available by Q2 of 2016.
- **Task Assignment**: Does not currently let you assign tasks to other users. The vendor reports that this will be available by Q2 of 2016.
- **Board/Management View**: Provides a focused, roles-based view for management and board members that can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles. The vendor reports that this will be available by Q2 of 2016.

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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices, but the entire interface is responsive.
- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor protects the security and integrity of data stored within the system through a variety of methods, including redundant scheduled backups and geographically-separate redundant servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for some, but not all, fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" tags for staff use.
- **Custom Fields**: Users cannot currently add custom fields.
- **Online Information Customization**: Does not support online applications.
- **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 extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets for navigation items and some, but not all, menus.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 support for a fee. Users can purchase blocks of professional services hours that they can use toward support or toward other services (e.g., customization, strategy, operational, monitoring, evaluation, and learning consultations).
- **Online Support**: Vendor provides online or chat support for a fee. Users can purchase blocks of professional services hours that they can use toward support or toward other services (e.g., customization, strategy, operational, monitoring, evaluation, and learning consultations).
- **Manuals and Documentation**: The vendor provides manuals and help documentation customized to each client. Documentation includes visual references such as screenshots.
- **Training**: The vendor provides initial training in person or via the Internet, at additional cost, and additional training sessions can be scheduled at additional cost.
- **User Support Forums**: There are user support forums or discussion groups available. The community also hosts an annual in-person user meet-up.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2007. The system has been in use as a business intelligence and analytics tool since 2009, and as a grants management system since January 2016.
- **Client Base**: The vendor reports that it has one client using the system for grants management, and 10 clients using the system as a Business Intelligence and Analytics tool. Breakdown by foundation type is 50% private and 50% family.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 5
- **Percent of Survey Respondants who Would Recommend the system**: 100 %
- **Training Score**: 2.00
- **Implementation Score**: 1.67
- **Support Score**: 1.73

GRANTSONLINE™

Designed as the successor to CultureGrants Online™, WESTAF's GrantsOnline™ (GO for short) was built by grantmakers for use by the state arts association sector. In addition to traditional grants management functionality, GrantsOnline™ has some unusual features likely to be of interest to arts funders, such as built-in support for the National Endowment for the Arts reporting requirements, and the ability for applicants to submit videos in support of their applications. Conveniently, the videos stream rather than download, although files are converted to the Flash format, which isn't well supported on iOS devices like iPads. While generally strong in internal tracking, the system has a comparatively limited ability to track grants easily by categories and codes, and grantee data is organized by grant cycle, rather than by organization, so viewing a history of applications and grants across multiple years takes additional steps than in other systems. 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, and you cannot report on the dollar allocations by categories or codes. Pricing for GrantsOnline™ has three tiers and starts at $4,450 in annual license fees for five grant programs and up to 500 users with a first-year setup fee of $7,550. Additional media storage is available at additional cost.

- **Pricing (small org)**: First Year: $12,000
- **Pricing (small org)**: Annual Recurring: $4,450
- **Pricing (large org)**: First Year: $33,850
- **Pricing (large org)**: Annual Recurring: $12,550

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, but not specific percent or dollar allocations without customization.
- **Splitting Categories**: It's not possible to split grants across program codes without customization.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you attach files to grant records, including Word documents, Excel spreadsheets, .PDFs, as well as audio and video files.
- **Searching for Grant Records**: 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 as 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 to Grant Records**: Does not easily let you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The system supports the standard taxonomy for state arts associations developed by the National Endowment for the Arts. Users have the ability to incorporate other industry-standard taxonomies into the system through customization.

- **Ability to View Related Records and Data Across Records**: There is limited availability to see related records and data across records. Grantee records are organized by grant cycle, not organization.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal 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 for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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 the system warns you before navigating away from a page if you do not save manually. The vendor reports that this functionality will be available by Summer 2016.
- **User Registration**: Applicants enter email address and password, but are not sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant. This packet includes a listing of uploaded documents with links to view or download them.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet. The vendor reports that a new, responsive interface will be available in Summer 2016.
- **Duplicate Accounts**: The system checks the username of each new registrant to make sure it doesn't already exist in the system. Duplicates can also be identified on the back end.
- **Unified Accounts Across Grantmakers**: There's no means of applicants or grantees to manage all grant information for all funders in the system from a unified account.

- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, and allow a grantmaking staffer to comment or make suggestions, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system. Audio and video samples are converted to Flash upon upload.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation with a simple WYSIWIG editor. For more advanced form design, the system supports CSS.
- **Character and Word Counts**: The system includes character counts for application questions, which can be set and adjusted by a staff user for any field, but does not include word counts.
- **In-System Help for Applicants**: Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms. The vendor asks the foundation to be the "first line of defense" for applicant inquiries, but can take on technical inquiries as needed.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or were granted in the past. Because grantee records are organized by grant cycle, not organization, viewing the complete history with a single grantee across multiple years is less intuitive than in other systems.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Lets external reviewers print out full grant application information by converting applications and support materials into a ..PDF file, but not summaries of grants.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: Reviewers can view selected documents associated with the request and stored in the system, but it requires some clicks to navigate there from the reviewer portal home page.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which is customizable by foundation staffers. You can also choose to weight certain scores over others.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review. The system doesn't support the tracking of reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades. Reviewers can assign recipients to comments on applications (e.g., the applicant, other reviewers).
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score. Aggregation is available only through reporting.
- **Review Status Notification**: It's not possible for the proposal owner, external reviewers, or grants management staff to be automatically notified when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Lets you click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar Charity Check. Users must purchase verifications directly from GuideStar.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. The system checks against GuideStar Charity Check.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself by manually verifying grantees against GuideStar Charity Check.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor provides documentation on how to manually look up organizations through GuideStar Charity Check, as part of the online help manual, including screenshots.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries and choosing which fields to include, as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications by creating a board book in the system and running a query to populate the book with the relevant applications.
- **Pre-Print Viewing and Customization**: You can view letters pre-print and customize them.
- **Board Docket Attachments**: It's possible to attach documents to board dockets.
- **Electronic Signatures**: The system has limited ability to support electronic signatures through a custom text box, but not to provide independent secure verification.
- **Electronic Templates**: There are no default templates for electronic or tablet view, but the system supports the creation of sophisticated .PDFs for board meetings.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual, but multiple recipients must be copied or bcc'ed on the email.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. You can preview and edit emails to individuals after merging them, but not emails to groups.
- **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**: Reminder emails are automatically generated and sent based on system events, not date or time. It is possible to set up and send scheduled reminder emails to applicants and grantees by configuring workflow rules.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers will not show up as active contacts for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact or email reporting reminder to report contact).
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization, by adding a custom form to the grantee record. This log can be threaded and is searchable.
- **Email Capture**: Does not let you capture emails from an external email system automatically.
- **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 & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you set up conditional logic for progress reports, but not branch data collection, depending on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports and the system reporting functionality. Reports can only view outcomes data within a single grant cycle—it is not possible to view grantee progress across multiple years.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines and can merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The system does not include a suggested format or formats, but the vendor works with clients during implementation to configure forms according to best practice.
- **Supporting Data Collection for User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups through its report builder.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality. Reports can only view outcomes data within a single grant cycle—it is not possible to view grantee progress across multiple years.

Payments

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

Budgeting

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

- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year, but requires customization at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, but requires customization at additional cost.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting, but requires customization at additional cost.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios, but requires customization at additional cost.
- **Budgeting and Grant Requests**: Budgeted line items can be set up to automatically create grant requests.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports, actions, or queries without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Cannot track or report summaries based on any codes—for example, to show grant money paid for a set of geographical region—as the system does not support categorization by anything other than program and grant cycle.
- **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.
- **Automating Reports**: Program reports can be set to automatically run and send to individuals or groups, but this requires customization at additional cost.
- **Visual Reports**: It's not possible to create, view, and export data in a visual graphic representation—e.g., charts or graphs.
- **User Dashboards**: The system cannot provide "dashboard" views that summarize the grants currently relevant to each individual user, or let users create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.

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 of 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 with a task list upon sign on.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: 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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. Audio and video attachments require Flash, and so cannot be viewed on the iOS operating system. However, Android-based mobile devices play audio and video attachments. The vendor reports that a new, responsive interface will be available in Summer 2016.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. Audio and video attachments require Flash, and so cannot be viewed on the iOS operating system. However, Android-based mobile devices play audio and video attachments. The vendor reports that a new, responsive interface will be available in Summer 2016.
- **Data Integrity and Security**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its server.

Overall Customization

- **Dropdown Fields**: Lets you customize 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 Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design elements.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's not possible to define custom language sets based on user, group, or giving program without customization.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 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.
- **Online Support**: The vendor offers an interactive, custom-built online help center called GO Helpdesk at gograntsonline.org/help. They conduct weekly training webinars and record/edit training tutorials that are posted to GO Helpdesk for streaming.
- **Manuals and Documentation**: The vendor provides manuals and documentation. The manual is divided into searchable, easy-to-read segments to allow feedback from clients.
- **Training**: The vendor provides initial training, which can be onsite, at no additional cost. The vendor spends approximately 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 it has 60 clients. Breakdown by foundation type is 5% private and 95% government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 1
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

GOOD DONE GREAT GRANT MANAGEMENT SYSTEM

Good Done Great Grant Management System (GDG) has undergone significant changes in the past couple of years, including a new focus on Corporate Social Responsibility (CSR) and corporate philanthropy clients. It remains an affordable hosted solution with strong functionality. Online forms built in Grant Management System can be matched to the look and feel of an organization's website. Facilitated by an intuitive navigation scheme, information collected online can easily be managed, viewed, and reported on by grants administrators. Letter and email templates can be custom-formatted to organizational standards, and can contain mail-merge fields, which helps with large mailings. Improvements include support for multiple currencies and email delivery statistics. Major developments since we last reviewed this system in 2013 include the ability for grantees to apply to multiple different funders on the system using a single, unified account that is automatically verified against the IRS and OFAC databases. The vendor has also made considerable updates to improve functionality for online forms. A small foundation would pay about $10,000 for implementation of the system and about $11,800 each year, which includes basic training. A larger foundation would pay around $28,500 for implementation, and $42,870 each year, which would include custom, on-site training.

- **Pricing (small org)**: First Year: $21,800.00
- **Pricing (small org)**: Annual Recurring: $11,800.00
- **Pricing (large org)**: First Year: $71,370.00
- **Pricing (large org)**: Annual Recurring: $42,870.00

Internal Tracking

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

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor. The system offers a formatted portal page and you can control its look and feel.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal 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 for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections. Additionally, the system warns you if you do not save manually before navigating away from the page.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet with a different interface.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Unified Accounts Across Grantmakers**: Applicants or grantees can manage all grant information for all funders in the system with a single logon.

- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, get comments or suggestions from a reviewer, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: Offers a full virus scan feature to prevent malicious files from being uploaded into the application.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system checks against multiple databases, including the IRS Business Master File, the Canada Revenue Agency, and the UK Charity Commission. Provides updates based on the revocation list. The tax status automatic check includes auto population of related fields for legal name, EIN and tax status, and includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). Lets you perform checks and updates in batch.

- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. The OFAC check includes date and time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor does not provide documentation showing how to manually look up GuideStar data or to export the necessary grants data with Foundation Center.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and that are time-stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Electronic Templates**: Includes templates for print and electronic formats, including a mobile-enabled interface.

Emails

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

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual no longer associated with a grant within the system's audit trail, and they will not show up as an active contact for communication. However, the individual no longer appears on the organizational record of the grant.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.

- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: It's possible to communicate with a contact according to their relationship with the grant or organization—for example, to send the payment letter to the payment contact or email reporting reminder to report contact—through segmentation.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system automatically. External emails can be added to grant or organization records manually through notes fields.
- **Contact Synchronization**: It's not possible to automatically synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by program and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen through custom reports or adding custom fields on the grant record.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. System also lets you merge field info from requirements into reminder email.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor works with clients at the time of implementation to include suggested formats.
- **Supporting Data Collection for User Groups**: The system has some ability to support user groups within the system to help collect uniform evaluation data across groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting and lets you print checks directly from the system using templates or by integrating with the accounting system.

- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions, and the vendor can handle payment disbursements for you at additional cost.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but the vendor could build integration with accounting packages for additional cost, so long as there is an API available for the accounting system chosen. The vendor also suggests batch uploads for data transfer.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: There's no current support for interest repayments on PRIs, but the vendor is willing to configure this for clients if needed.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments, refund payments, and place payments on hold through statuses with workflows associated with them. Lets you track quid pro quo and in-kind payments through configuration. It's not possible to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch. The vendor can handle award disbursements for the client, at additional cost.

Budgeting

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

System Querying and Reporting

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

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 that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members that can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

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

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Lets you create unlimited custom fields with the same permissions as custom fields. The creation and change is tracked within the audit log for the entire system.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program. The vendor reports that it works with translation firms to handle localization, and has already worked in 10 different languages.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

Ease of Use

- **Interface Layout**: The interface is polished looking and neatly laid out, and has recently undergone some design improvements.
- **Intuitive Labels**: Navigation and action items are labeled intuitively so that a user doesn't have to understand language specific to the system in order to effectively use it.
- **Easily Taking Action**: On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts**: The system pulls together the information and actions 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 for foundation administrators only. Support packages for other foundation staff, applicants, and reviewers are available for an additional fee.
- **Online Support**: Vendor offers an online support system accessable from within the software using a Feedback tab, which is available for foundation staff. Online support for grantees is available at additional cost.

- **Manuals and Documentation**: Vendor provides online 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**: There are 141 grant-makers currently using the Good Done Great system. The breakdown of foundation type is 44% community foundations, 32% private/family, 20% corporate, and 4% government. The vendor now works exclusively with corporate foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 3
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

GRANTED GE SPECTRUM

Fusion Labs GE Spectrum is a standalone system which includes several facets, including the GrantedGE grants management system and either the vendor's native Spectrum online web portal, or PROFFER online application management, which integrates with Blackbaud's NetCommunity. The system can integrate tightly with other Blackbaud products, too, such as Raiser's Edge, Financial Edge, and Blackbaud Enterprise CRM. However, unlike the earlier GrantedGE system, those external products are no longer required for GE Spectrum. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Lab's online form modules supports reasonably sophisticated formatting of forms, including application branching, more sophisticated eligibility quizzes, and support for multiple logons for applicants from a single organization. Annual license costs range from around $11,000 to $110,000 based on the size of the foundation, with additional cost for initial configuration based on the complexity of the implementation.

- **Pricing (small org)**: First Year: $11,000
- **Pricing (small org)**: Annual Recurring: 24% of Software Purchase Price
- **Pricing (large org)**: First Year: $110,000
- **Pricing (large org)**: Annual Recurring: 24% of Software Purchase Price

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories (in this system, known as characteristics), such as geographic or population-based codes, and track across specific dollar allocations.
- **Splitting Categories**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs, as well as audio and video files.
- **Searching for Grant Records**: 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 as paper can be manually entered into the system or imported via Excel.
- **File Attachment Method**: The system saves only the link (i.e., file system path) for attached documents. Files that are uploaded as part of the online application submission are embedded in the database.
- **Batch Updates to Grant Records**: Except for application status field, does not let you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The vendor maintains a commitment to implementing an industry-standard taxonomy within the system should one become widely used.
- **Ability to View Related Records and Data Across Records**: Lets you easily view related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: It's possible for individual applicants and organizations to apply for grants from the same grant program through the use of conditional forms on an online application.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor, and that are fully configurable to the look and feel of the foundation's website.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: The system supports five application stages, which can be of virtually any kind, and supports a multiple choice eligibility quiz.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees and applicants cannot transfer account and history to a new staff contact, but could contact the grantmaker to make that transfer.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal 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, conditional fields, and multiple pages, but not rich text.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections, and the system prompts you to save the application at intervals.
- **User Registration**: System registration can follow standard best practices—applicants enter email address and password and are sent a confirmation email (though the process is largely client-defined.) You can set access for applicants to access different parts of the system at the point of registration.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system does not explicitly support application processes via mobile or tablet. The vendor reports that some mobile support for the system will be available as of Q2 2016.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Unified Accounts Across Grantmakers**: Applicants or grantees can manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: A grantmaker can see an application in progress once it is saved within the system, but not provide comments or collaborate with the applicant before it is submitted.

- **Security Scan for Uploaded Documents**: The system does not include a virus scan for files uploaded to the system. The administrator can specify what file extensions you will allow to be uploaded, and their maximum limit.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website and offers a basic form-building wizard.
- **Character and Word Counts**: The system includes character but not word counts for application questions. Grantmakers can set and adjust character limit for any field.
- **In-System Help for Applicants**: A grantmaker can customize hover-over help text for any field in an online application.

Application Review

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

501(c)(3) and OFAC Status

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

- **Documentation for Organization Lookup and Data Initiatives**: The vendor does not provide documentation showing how to manually look up GuideStar data or to export the necessary grants data with Foundation Center, but the vendor can provide the necessary reports upon request.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and that are time-stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Electronic Templates**: Includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent as blind copies but as one-to-one.
- **Email Template Flexibility**: Lets you create emails for individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and edit individual emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email. It also lets you see the number of people who clicked on each link and bounce reports, but through third-party integration at additional cost.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **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, but at additional cost. Otherwise, emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: You must delete former grantseeker contacts from organizational records.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization, although you could do so via reports.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact, or email a reporting reminder to the report contact).
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.

- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field. However, to do this requires integration with NetCommunity at additional cost.
- **Contact Synchronization**: System does not automatically synchronize Outlook contacts, but vendor can provide a utility to update email addresses. Integration with NetCommunity provides more Outlook functionality, at additional cost.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by grant type or program and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is not possible to view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Grantees can submit progress report information through online data fields.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines, but it's a system-generated email and you cannot merge requirements information into it.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor works with clients to configure a suggested format during implementation.
- **Supporting Data Collection for User Groups**: The system does not currently support user groups to collect uniform evaluation data consistent with other groups, although the vendor would support such a strategy if clients asked for it.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Allows users to design and develop a custom check, which can be printed from within the system, but requires a real-time interface with a financial system to ensure that there is a financial audit trail.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: GE/Spectrum can be integrated with Blackbaud's Financial Edge and QuickBooks in real time. The vendor has experience in integrating the system with other accounting systems.
- **Automated Payment Approval Process**: Limited support for payment approval workflows.
- **Multi-Currency Support**: Only supports grants in 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments, make refunds, and place payments on hold. Has the ability to update payment details (e.g., general ledger account, fund, etc.) and ability to create payments in batch as an encumbrance batch. There's no current ability to track quid pro quo or in-kind payments, although you can track program-related expenses.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: Can make the process of running reports easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.

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

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, but menu and navigation options are determined by the modules and actions the user has permission to view or edit.
- **Audit Logging**: Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users with different "to-do" lists when they sign on to the system. You can configure these lists for different tasks (assigned, incomplete, overdue, etc).
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members.
- **Role-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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. The vendor reports that some mobile support for the system will be available as of Q2 2016.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. The vendor reports that some mobile support for the system will be available as of Q2 2016.
- **Data Integrity and Security**: Security is handled by a secure login/password environment, with specific data within the database encrypted to provide added security. An audit trail for key data modifications allows tracking of changes to the database.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Lets you create custom fields that have similar permissions to system-standard fields and tracks their creation and history in the audit trail.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will provide custom plug-ins, at an additional cost, to meet a client's specific needs, but most customizations are built directly into the base system.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path, unless existing tables are modified.
- **Support for Multiple Languages**: There is no ability to define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 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 needed.

Support and Training

- **Phone Support**: The vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support**: The vendor provides unlimited email support as part of the yearly maintenance fee, but no other online support options.
- **Manuals and Documentation**: The vendor provides a ..PDF user manual and help documentation files.
- **Training**: The vendor offers monthly classes. It also performs annual regional training at no charge.
- **User Support Forums**: Vendor provides an online forum where users can communicate with each other.
- **Installation and Maintenance**:
- **Installation and Maintenance**: The system can be hosted by the vendor or by various third-party services. To host the system locally, the clients need MS SQL server software, a Windows Server, and Windows Terminal Services (for remote access).

Vendor Background

- **History**: The vendor has been in business for more than 20 years. The Granted GE product has been in use since 2005 and the new version of GE Spectrum has been in general use since 2012.
- **Client Base**: Fusion Labs currently has approximately 150 clients for GE Spectrum. The breakdown by not-for-profit organizations is 10% private foundations, 65% community foundations, 10% healthcare foundations, 10% religious, and 5% other.

- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 6
- **Percent of Survey Respondants who Would Recommend the system**: 33 percent [Note that this represented 2 out of the 6 people who answered this question.]
- **Training Score**: 0.13
- **Implementation Score**: 0.00
- **Support Score**: 0.63

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 $1,000.

- **Pricing (small org)**: First Year: $3,700
- **Pricing (small org)**: Annual Recurring: $2,700
- **Pricing (large org)**: First Year: $14,000
- **Pricing (large org)**: Annual Recurring: $12,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs.
- **Searching for Grant Records**: 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 as 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 to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: You cannot easily see related records and data across records.

Online Applications

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

- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, a Letter Of Intent stage, a more detailed proposal stage, and many other stages as needed, but there is no support for automatically scored eligibility quizzes.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: The system does not have the ability for an applicant to transfer their account and history to a new staff contact without contacting the grantmaker.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: A grantee automatically receives a confirmation message upon submission of an application, but that message can't be customized.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text or create groups of questions—but the system uses collapsible sections in place of multiple page functionality.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress. Applications must be saved manually.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The preview packet does not include uploaded documents.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices.
- **Duplicate Accounts**: The system does not automatically check new registrants to make sure they don't already exist in the system, but the user has the ability to manually consolidate applicant records by running a report.
- **Unified Accounts Across Grantmakers**: There's no way for applicants or grantees to manage all grant information for all funders in the system from a unified account without customization by the vendor, possibly at additional cost.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not allow reviewers and applicants to work back and forth on a proposal.
- **Security Scan for Uploaded Documents**: The system itself does not scan files for viruses at upload.

Form Design and Flexibility

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

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.
- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: You cannot mail-merge fields into a system email.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics.
- **Event-Triggered Email**: Does not let you set up event-triggered emails.
- **Schedule-Triggered Email**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: Does not meet this criteria.
- **Tracking Organizational 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 Hierarchical Business Units**: Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization, but this requires customization at additional cost.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: It's not possible to set rules to communicate with a contact according to their relationship with the grant or organization (for example, to send the payment letter to the payment contact, or email a reporting reminder to the report contact).
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log without custom fields.
- **Email Capture**: Does not let you capture emails from an external email system automatically.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements that applies to all grantees, but those requirements cannot be customized for individual grantees.
- **Branching for Evaluation**: Can "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online, except for what is available in the application instructions.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system does not provide a method for foundation staff to compare grantee progress reports to outcome goals.
- **Online Progress Report Submission**: Grantees cannot submit progress report information online.
- **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.

- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system has the ability to configure a template of metrics to collect data on the grant program.
- **Overall Approach to Outcomes Reporting**: The system does not provide a method for foundation staff to define outcome goals for individual grantees or by program and calculate progress toward those goals.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: The system does not support scheduled payments. You would have to use custom fields to approximate this functionality.
- **Check Requests**: Cannot generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Not applicable as the system includes no native support for scheduled payments.
- **Schedule-Based Payment Viewing**: Not applicable as the system includes no native support for 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.
- **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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments that carry coding attributes of associated requests/organizations/contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online.
- **Other Payment Issues**: The system provides the ability to void or refund payments through custom fields only. It's not possible to create payments or update payment details in batch, and in-kind and quid pro quo payments can only be tracked through custom fields.

Budgeting

- **Budget Tracking Configuration**: Budgeting not supported.
- **Budget Amount Reporting**: Budgeting not supported.
- **Hierarchical Budget Tracking**: Budgeting not supported.
- **Basing Budgets on Past Years**: Budgeting not supported.
- **Multiple Programs Per Grant**: Budgeting not supported.
- **Multiyear Budgeting**: Budgeting not supported.
- **Drafting Budgets for "What-If" Scenarios**: Budgeting not supported.

- **Budgeting and Grant Requests**: Budgeting not supported.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.

System Querying and Reporting

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

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.
- **Role-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.

- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices.
- **Grant Information Review from a Mobile Device**: Does not let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields. The vendor will create custom fields for the client.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor excludes extensively customized systems from the upgrade path.
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 them.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but the user 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 needed.

Support and Training

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

Vendor Background

- **History**: The vendor has been in business since 2003. Grantmaker Closerware has been in general use since 2009.

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

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

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, and since we last reviewed the system, the vendor has added new global search functionality. PhilanTrack has also enhanced the online application form functionality (called "templates" in the system) to allow users to create custom questions on new forms without involvement from the vendor, but the relationship-management facility is limited, with only basic support for tracking communications with grantees. For example, you can't store a log of emails generated in the system. And while the system can generate automatic emails based on a number of action-triggers, there's no way to easily define parent/child relationships for organizations in the system. PhilanTrack's pricing starts at $3,000 annually with another $3,000 in first-year setup costs.

- **Pricing (small org)**: First Year: $6,000
- **Pricing (small org)**: Annual Recurring: $3,000
- **Pricing (large org)**: First Year: $20,000
- **Pricing (large org)**: Annual Recurring: $9,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Categories**: Lets you split grants across different codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program, and grant cycle. The vendor has made significant improvements to system search functionality.
- **Handling Paper Applications**: Applications received as 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 to Grant Records**: Lets you perform batch updates of defined coding and other fields as long as they are associated with a grant.
- **Support for Industry Taxonomy**: The system supports both the NTEE syntax and the industry-standard taxonomy defined by the Foundation Center.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The vendor can configure the system at implementation to allow both individuals and organizations to apply for grants from the same program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor. The system also provides a large set of user-created questions to choose from or add to.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: The vendor can configure eligibility quizzes to branch to multiple applications based on the applicant's responses.
- **Application Branching**: Branch logic can be used in eligibility quizzes, but not in LOIs, proposals, and status reports. However, eligibility quizzes can direct certain applicants to an entirely different LOI or proposal form based on their quiz responses.
- **Support for Multiple Stages**: The system supports a three-stage application with an eligibility quiz, Letter Of Intent, and proposal. Grantmakers can also create as many status report stages as they'd like.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Grantees have the ability to designate a new contact person for a proposal or grant.
- **Reuse of Application Data**: Applicants can easily see submitted applications and their whole history with a given grantmaker. They cannot copy an entire existing application to use as a template for a new one, but the system is built specifically to make it easy to reuse answers to previous questions. Applicants use a "find similar questions" feature to easily copy and edit past answers from any application they've filled out using the system.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, directly from the IRS Business Master File.
- **Viewing Proposal 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 or create groups of questions—but applications cannot contain multiple pages.
- **Spell Checking**: The system relies on the browser's built-in spell-check functionality.
- **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.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system checks the EIN, name, and mailing address of each new registrant to make sure it doesn't already exist in the system. Admin users also have the ability to review applicants for duplicates, and merge accounts.

- **Unified Accounts Across Grantmakers**: Applicants and grantees can manage their grant information for all funders using the system through a single account. Additionally, grantseekers can manage their grant information for all of their funders from their account, but can only submit information directly to those using the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: The system scans files for viruses at upload.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: For online applicants, Employer Identification Numbers are checked against the IRS database during the eligibility quiz. Otherwise, they can be checked by the grantor when entering a new organization. 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.

- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: The vendor provides in-line help text for importing grantee data from the IRS Business Master File.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on forms. The system will preserve an individual's history with a grant(s) even after they have left the organization. The organization, but not the grantmaker, can mark a contact as inactive. Inactive contacts are excluded from system generated communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization except as fiscal sponsors.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization.

- **Record of Correspondence**: Does not store any record of system-generated email or letters.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you automatically capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by program and customize them for individual grantees.
- **Branching for Evaluation**: Lets you set up requirements by proposal template, but not branch data collection depending on by type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is not possible to view both outcome goals and actuals on the same screen, except by requiring grantees to submit both the goals and actuals in their progress reports, or by running an ad hoc report.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines. The vendor can configure email templates to include merge fields.
- **Progress Report Tracking**: 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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. The vendor can provide suggested formats for progress reports.
- **User Groups**: The system has the ability to support user groups in order to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Allows you to export a filtered set of grant records that can be used to generate paper check requests outside of the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years, on a per-grant basis.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.

- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages, but can export payment information to an Excel file that can be imported into an accounting package. The vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement, but the system only flags contingencies rather than enforcing them.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on Program-Related Investments.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: The system provides the ability to pull reports on payments that carry coding attributes of associated requests/organizations/contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal.
- **Other Payment Issues**: Voided and refunded payments can only be tracked through notes. In-kind or quid pro quo grants can only be tracked as a separate, custom grant type.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.

- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include, and filter by, nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers. The system also supports ad hoc reporting from nearly any field displayed to users by exporting data to Excel for formatting.
- **Grant Summary Tracking**: You can define codes and see them in reports, but these codes cannot be rolled up hierarchically—for example, to show grant money paid to each education sub-program as well as total education grants—except by exporting the report to Excel and analyzing it there.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not currently let you search within attached documents.
- **Automating Reports**: Reports cannot be set to run and send automatically.
- **Visual Reports**: The system provides the ability to create, view, and export data in a visual graphic representation (e.g., charts or graphs).
- **User Dashboards**: The system cannot provide "dashboard" views that summarize the grants currently relevant to each individual user or let users create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, such as the Foundation Center eReporting Excel format.

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**: 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.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: 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 browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Users can add or rename fields for forms, but it is not possible to add or rename fields in the system interface itself.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs, possibly at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 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**: 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 that provides phone support past the initial 30 days.
- **Online Support**: Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation**: The vendor provides online manuals and help documentations, including training videos and a troubleshooting guide as part of an online knowledge base.
- **Training**: The vendor provides two hours of 1:1 web-based initial training, and a one hour training for administrators. Additional training sessions can be scheduled, at additional cost. 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**: PhilanTech has been in business since 2004 and was acquired by Altum in 2014. PhilanTrack has been in use by clients since 2007.
- **Client Base**: The vendor reports that it has more than 50 clients. Breakdown by foundation type is 60% private, 10% corporate and 30% community foundations.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

POWEROFFICE

PowerOFFICE is a solid, well-rounded system with particularly strong features around relationship and contact management. Built on IBM Notes Domino, the system can be installed on your organization's server, or hosted on the vendor's servers. PowerOFFICE is fairly strong in both print and email communication, although delivery statistics for broadcast email are only available through customization by the vendor. The system provides relationship and contact management through the PowerPEOPLE module, which allows users to track all of the communications they've had with individuals and associate multiple contacts to organizations and grants. The online application process is straightforward—the vendor will create application forms for you, but applicants cannot save incomplete applications to finish later before submitting, and neither can they view or print submitted applications without customization. A small foundation that receives 100 applications or fewer annually could expect to pay about $1,560 per year for a hosted version of the system, plus a one-time setup fee for online applications starting at around $1,000, or a one-time cost of $4,000 to install the system on your own server, plus annual fees of $800 and the setup fee for online applications. For larger foundations which receive up to 1,000 applications annually, the system would be $3,000 per year hosted (plus setup fee), or $12,000 for installed (with an annual fee of $2,000).

- **Pricing (small org)**: First Year: $2,500 to $3,000 or $200 to $250 per month
- **Pricing (small org)**: Annual Recurring: $1,600 to $2,000 or $150 to $200 per month
- **Pricing (large org)**: First Year: $5,000 - $10,000
- **Pricing (large org)**: Annual Recurring: $1,600 - $2,000

Internal Tracking

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

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online with, at a minimum, file uploads, drop-down boxes, checkboxes, and text fields, but the vendor must set up application forms for you at additional cost.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications without customization by the vendor, possibly at additional cost.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: The system supports multiple application stages, including "New" proposal, "Pending" review, "Waiting" for additional criteria, "Approved", "Withdrawn", and "Declined". Users can not customize these statuses, but can create "sub-statuses" for each.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees without customization by the vendor, possibly at additional cost.
- **Transfer of Account and History**: The system does not have the ability for an applicant to transfer their account and history to a new staff contact without contacting the grantmaker.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal Status Online**: Applicants cannot view their status online without customization, possibly at additional cost.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Applications are configured by the vendor.
- **Spell Checking**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants must complete applications in one session.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: The vendor can create a registration process for applicants at implementation, for additional cost.
- **Lost Credentials**: Lost credentials can easily be reset by the grantmaker, but not by applicants.
- **Viewing Applications**: Applicants cannot view or print applications without customization by the vendor, possibly at additional cost.
- **Preview Packet**: Applicants cannot view or print applications without customization by the vendor, possibly at additional cost.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system does not automatically check new registrants to make sure they don't already exist in the system, but the user has the ability to manually consolidate applicant records based on mailing address.
- **Unified Accounts Across Grantmakers**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers and applicants to work back and forth on a proposal through email only.
- **Security Scan for Uploaded Documents**: The system itself does not scan files for viruses at upload. Clients have the ability to restrict what file types can be uploaded by applicants.

Form Design and Flexibility

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

Application Review

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

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: There is no in-system support for checking 501(c)(3) status without customization.
- **OFAC Status Checking**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists without customization.
- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You can view letters pre-print, but you cannot customize them.
- **Board Docket Attachments**: Lets you attach documents to the board docket.
- **Electronic Signatures**: The system typically uses individual user IDs for authorization, but can support third-party electronic signature services.
- **Electronic Templates**: Includes templates for print and electronic formats.

Emails

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

Relationship Management

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

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees. Additional requirement templates by program can be configured using the online form functionality.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant, by creating specific task forms or subgroups for each grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online without customization by the vendor, possibly at additional cost.

- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is not possible to view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports. Foundation staff can configure the grantee portal to display upcoming reporting deadlines.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: Can track that a progress report has been received, but not whether staff has approved it without customization by the vendor, possibly at additional cost.
- **Storing Progress Report Data**: You cannot store progress report information submitted by grantees in multiple data fields (i.e., you can only store progress reports as an attached document).
- **Creating Online Progress Report Forms**: Does not let you create online progress report forms without customization.
- **User Groups**: The system has the ability to configure task lists to collect data on the grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants using custom fields on application forms to collect initial goals, and the system reporting functionality to view individual progress or overall outcomes by program area or custom category.

Payments

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

- **Viewing Payment Schedule Online**: Lets you display the payment schedule for their award(s) online through the grantee portal, with customization, including both paid and upcoming payments.
- **Other Payment Issues**: The system provides the ability to void or place holds on payments in the system, update payment details in batch, and track in-kind and quid pro quo payments. Users cannot refund payments in the system or create payments in batch.

Budgeting

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

System Querying and Reporting

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

- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.

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

Data Access

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

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Users cannot add custom fields, unless they have purchased the source code. The vendor can add fields for the user upon request, possibly at additional cost.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets for applicants and reviewers based on user, group, or giving program.
- **Customization by Foundation Staff**: Most basic configuration as described above can be performed by the user, without involvement from the vendor, but you cannot add custom fields without purchasing the underlying source code.

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

Installation and Maintenance

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

Vendor Background

- **History**: The vendor has been in business as PowerOFFICE since 2002; the system has been in use by clients since 1995.
- **Client Base**: The vendor did not disclose the number of clients. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

PROPOSALCENTRAL

Altum's 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 reviewed. Lack of budgeting support and weak mail-merge facility for printed letters, however, may make it less appealing to some organizations. A technical feel and suboptimal layout make the system harder to learn than many others. Since we last reviewed proposalCENTRAL, the vendor has added a new reporting engine, which supports visual data representations such as charts or graphs, but requires a separate log-in from the rest of the system. Pricing can start as low as $5,000 per year for very small foundations that require less configuration. A foundation with five users and a single grant program can expect to pay $10,000 per year. Very large foundations with complex processes and substantial configuration needs may pay $55,000 up through $100,000 per year.

- **Pricing (small org)**: First Year: $10,000.00
- **Pricing (small org)**: Annual Recurring: $9,000.00
- **Pricing (large org)**: First Year: $55,000.00
- **Pricing (large org)**: Annual Recurring: $50,000.00

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date. Categories and codes can only be assigned post-award.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and see the specific percent allocation of a grant across each. Applicants have the ability to define the categories or codes related to their proposal, and select the percent allocation to each.
- **Splitting Categories**: Grants can be split by custom categorization codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Only lets you update grant information such as 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 its own grant application.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching for Grant Records**: 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 as 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 to Grant Records**: Does not let you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The system supports standard health and biomedical taxonomies and categories by default. Users have the ability to incorporate other industry-standard taxonomies into the system through customization.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields, but the vendor must set up application forms for you.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's not possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: The pre-defined application sections include some branching questions—for example, to show a set of additional questions if a project involves human subjects—but in most cases branching questions must be configured at additional cost.
- **Support for Multiple Stages**: Only supports two application stages: LOI and one additional stage.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: An applicant record represents an individual, separate from the organization. When a new staff member creates an account, they can be connected to the organization's prior grant history.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number, but organization information can be carried over from one application to another.
- **Viewing Proposal 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**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant and work back and forth until a proposal is complete. Reviewers can collaborate on an application prior to submissions if the applicant adds them as a user on their application.

- **Security Scan for Uploaded Documents**: All documents and images are scanned for viruses before uploading to the system.

Form Design and Flexibility

- **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. All forms are created by the vendor.
- **Character and Word Counts**: The vendor can set character counts, but not word counts, for application questions, and can set a max limit, but not a minimum, for each.
- **In-System Help for Applicants**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Both internal and external reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs, which can be set up and customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: 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 email 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.
- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the 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. Customization of fonts, colors, and logos is applied by the user in the Word output file the system produces.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You cannot view or customize individual letters before printing them.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process.
- **Electronic Templates**: Includes templates for email, but not print formats.

Emails

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

Relationship Management

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

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Progress report forms cannot "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **User Groups**: The system has the ability to configure a template of metrics to collect data on the grant program.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Cannot generate paper check requests without exporting the information to Excel and manually mail merging in Word.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including QuickBooks and other major packages, at additional cost.
- **Automated Payment Approval Process**: 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, but the system only flags contingencies rather than enforcing them.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for PRIs.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: The system has the ability to void or refund payments or put payments on hold.

Budgeting

- **Budget Tracking Configuration**: Budgeting not supported.
- **Budget Amount Reporting**: Budgeting not supported.
- **Hierarchical Budget Tracking**: Budgeting not supported.
- **Basing Budgets on Past Years**: Budgeting not supported.
- **Multiple Programs Per Grant**: Budgeting not supported.
- **Multiyear Budgeting**: Budgeting not supported.
- **Drafting Budgets for "What-If" Scenarios**: Budgeting not supported.
- **Budgeting and Grant Requests**: Budgeted line items cannot be set up to automatically create grant requests.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayments on PRIs.

System Querying and Reporting

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

- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Users can save a particular "view" or query, but cannot create a true dashboard. The vendor reports that users will be able to create individual "dashboard" views in the reporting engine in late 2016.
- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, including the Foundation Center eReporting Excel format.

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. Within the "committee" role, you have some ability to define custom roles and grant or deny individuals access to certain large areas of system information, such as a module, but cannot control permissions at a more detailed level.
- **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 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 a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: Does not let you assign tasks to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members, though board members could be assigned a "view only" role.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles, but the set of tasks that can be assigned is limited.

Data Access

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

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant 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 Fields**: The system includes many pre-built fields that can be configured or renamed by the user and can be reported or queried on, but the user defined names do not carry over into the reporting tool.
- **Online Information Customization**: The vendor will customize the information requested in online applications and review forms.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost.

- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's possible for clients to define custom language sets for system navigation and menus, or create application forms in multiple languages.
- **Customization by Foundation Staff**: Most configuration or customization as described above can be performed by the user, but some functions, such as online applications and review forms, can only be configured by the vendor.

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 them.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but the user 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.
- **Online Support**: Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation**: The vendor provides manuals and help documentation online, including online training materials, recorded training webinars, and videos.
- **Training**: The vendor provides initial training over the phone at no additional cost, and additional training sessions can be scheduled.
- **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**: This hosted system is 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 it has about 98 clients. Breakdown by foundation type is approximately 76% non-profit (7% of which are international) and 24% government.
- **Sustainability**: The revenue earned from the grantmaking system covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

SMALLDOG

Smalldog, by Smalldog Net Solutions, is both one of the youngest systems in this report, and one of the few that primarily serves community foundations. This hosted, online system boasts strong built-in accounting and payments functionality with support for donor-advised funds. However, it offers only basic support for online applications—you can create a different application for each grant opportunity, but you cannot change the fields and questions asked, or customize the look and feel to match your organization's website. Similarly, the review process for submitted applications is a simple, but straightforward, single stage of approval or denial. Uniquely in this space, Smalldog provides its own crowdfunding platform, where grantees can publicly post their project on the foundation's site and collect individual donations. Pricing for the system is a flat rate for all clients, with a $20,000 one-time fee for setup, initial training, and implementation, with an ongoing fee of $1,000 per month.

- **Pricing (small org)**: First Year: $32,000
- **Pricing (small org)**: Annual Recurring: $12,000
- **Pricing (large org)**: First Year: $32,000
- **Pricing (large org)**: Annual Recurring: $12,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Categories**: Does not let you split grants across different codes or categories.
- **Custom Categorization Codes**: Does not let you define custom categorization codes.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach image files—including PDFs—to grant records, but you cannot attach Word documents or Excel spreadsheets.
- **Searching for Grant Records**: Grants and applications are only searchable by organization's legal name, application ID, and profile name.
- **Handling Paper Applications**: Applications received as paper can be entered into the system, but you must log in as a grantee to do so.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates to Grant Records**: Does not easily let you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online, but you cannot customize the questions asked or the look and feel of the application form.

- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: There's no eligibility quiz available in the system.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: Does not support multiple application stages.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: It's not possible for a grantseeker to transfer account and history to another person within that organization. An administrator at the foundation can make the transfer on the back end.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal Status Online**: Applicants cannot 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**: Grantmakers cannot extensively format applications with rich text, groups of questions, or multiple pages.
- **Spell Checking**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants must complete applications in one session.
- **Application Auto-Saving**: The system does not automatically save applications in progress.
- **User Registration**: The system does not support login credentials for applicants—foundation staff must manually, through the back end, add the organization to the system and grant permission to apply online.
- **Lost Credentials**: The system does not support login credentials for applicants.
- **Viewing Applications**: Applicants can easily view or print applications in process.
- **Preview Packet**: The system does not support preview packets of applications.
- **Mobile Device Application Access**: Application forms are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system does not support login credentials for applicants. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not allow reviewers and applicants to work back and forth on a proposal.
- **Security Scan for Uploaded Documents**: The system itself does not scan files for viruses at upload, but applicants are restricted to uploading only PDFs and other image files.

Form Design and Flexibility

- **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. The vendor will customize online application forms with your logo.
- **Character and Word Counts**: The admin can choose to display the character limit for application questions, but the system cannot include character or word counts.
- **In-System Help for Applicants**: Clients have the ability to customize the text around an application form to provide additional instructional text.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what

grants they've applied for, had 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. All fields on the application form are required.
- **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 cannot print grant summaries or full grant information.
- **Reviewer's Portal**: Reviewers must navigate the full grants management interface to see and review grant applications.
- **Viewing files**: Reviewers can easily view uploaded documents associated with the request and stored in the system by downloading the files and viewing on their desktop.
- **Grant Review Workflows**: Does not let you define automatic steps and rules for the grants review process.
- **Multiple Reviewer Support**: Supports only a single review comment and rating for each application, as opposed to information from multiple reviewers.
- **Scoring Flexibility**: The same information or scoring scheme must be used for all grants and programs.
- **Online Application Review**: Reviewers can view applications online, but not rate them.
- **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**: You cannot report on numeric review scores 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**: 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**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.
- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization**: You cannot generate letters with mail-merged fields within the system.
- **Board Docket Attachments**: Does not let you attach documents to the board docket.
- **Electronic Signatures**: The system does not provide support for electronic signatures for independent secure verification.
- **Electronic Templates**: The system does not include templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you easily send an email to a particular individual, but not to a group of people at once.
- **Email Template Flexibility**: You cannot mail-merge fields into system email.
- **Email Attachments**: 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**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: You cannot keep a record of an individual who is no longer associated with a grant within the system—those individuals must be deleted from the organization.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you 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 automatically
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: You can manually define grant requirements for each grantee individually, but cannot set up any default set of requirements that apply to all grants.
- **Branching for Evaluation**: Cannot "branch" data collection based on grant type.
- **Grant Requirement Deadlines**: Grantees cannot view grant requirement deadlines online.
- **Viewing Grant Requirements**: There is no easy way to see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system does not provide a method for foundation staff to compare grantee progress reports to outcome goals.
- **Online Progress Report Submission**: Grantees cannot submit progress report information online.
- **Deadline Reminder Emails**: Cannot 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**: You cannot store progress report information submitted by grantees in multiple data fields; you can only store progress reports as an attached document.
- **Creating Online Progress Report Forms**: Does not let you create online progress report forms.
- **User Groups**: The system does not support user groups to collect uniform data.
- **Overall Approach to Outcomes Reporting**: The system does not provide a method for foundation staff to report on grantee impact.

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.

- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule.
- **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**: Supports an automated payment approval process, but without a configurable workflow.
- **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**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for PRIs.
- **Payment Notes**: Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting**: Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal.
- **Other Payment Issues**: Lets you void or refund payments within the system, but you cannot put payments on hold. Lets you track quid pro quo and in-kind payments through the donor or fund record. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter only a single budget amount for your whole organization. Budgets for each grant program can be tracked as funds under the primary organization budget.
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal. However, donors with donor-advised funds can choose to fund public crowdfunding requests on the system.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayment on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal

training.

- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating a much larger set, except by bookmarking the report in your browser.
- **Saving Modified Reports**: Does not let 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, and grouping. Additional formatting is possible by exporting the report to Microsoft Excel.
- **Grant Summary Tracking**: Cannot track or report summaries based on any codes—for example, to show grant money paid for a set of geographical region—but can report on grant summaries by fund.
- **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.
- **Automating Reports**: Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: There is no ability in the system to create charts or graphs from report results. Additional formatting is possible by exporting the report to Microsoft Excel.
- **User Dashboards**: The system does not provide "dashboard" views to summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: The system does not, by default, contain report templates that align with sector-wide reporting standards.

Roles and Permissions

- **Permissions Granularity**: You can grant or deny individuals access to certain large areas of system information, such as a module, but cannot control permissions at a more-detailed level.
- **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, but menu and navigation options are determined by the modules and actions the user has permission to view or edit.
- **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.
- **Role-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**: Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device**: Provides an interface specifically designed to let you see grant sum-

maries and details from a mobile or tablet device.

- **Data Integrity**: System data is stored on Amazon's AWS servers. The vendor reports that the integrity and security of data within the system is protected through multiple webservers, mirrored databases, daily backups, as well as backups to another Amazon AWS region on a daily basis. The system only runs on HTTPS connections, and database servers are protected by firewalls. All code updates to the system are developed and tested before being released to the production environment.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Does not let you add custom "internal tracking" fields for staff use.
- **Custom Fields**: Users cannot add custom fields.
- **Online Information Customization**: Does not let you customize the information requested in online applications.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost, but doesn't often do so.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

Ease of Use

- **Interface Layout**: The interface is not as polished looking as some systems, but it is clean and the 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 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**: 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.
- **Online Support**: Vendor provides unlimited email support without additional cost.
- **Manuals and Documentation**: Vendor provides a wiki at docs.smalldognet.com with manuals and documentation, including videos.
- **Training**: The vendor provides initial training via the Internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums**: There are user support forums or discussion groups for the system available through Google Groups.

Installation and Maintenance

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

Vendor Background

- **History**: The system has been in use since 2011 (by Community Foundations). Smalldog Net Solutions has been in business since 1998.
- **Client Base**: The vendor reports that it has 10 clients; all are community foundations.

- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 14
- **Percent of Survey Respondants who Would Recommend the system**: 100 percent.
- **Training Score**: 1.67
- **Implementation Score**: 1.35
- **Support Score**: 1.66

SMARTSIMPLE GMS360°

SmartSimple's GMS360° is a flexible, easy-to-use system—qualities that have been enhanced in recent updates with new global search functionality. 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. New functionality allows users to create multiple versions of the same form and display different versions to different applicants automatically through conditional logic. Uploaded files can be version-controlled and indexed, making their contents available to queries and reports. The system provides useful support for managing relationships, broadcast email, mail-merged letters, and reporting, as well as integrated task lists and dashboards to manage each user's work. Payment functionality and Budgeting are particularly strong, with support for payment workflows, multiple currencies, and interest repayment schedules for program-related investments. SmartSimple implementation starts at about $15,000, depending on number of programs and complexity of grant workflows and processes. Annual support and maintenance are included in monthly user fees." High usage" staffers such as grants administrators and program officers who use the system more than forty hours a month, are billed at $1,176 per user per year (billed on a monthly basis). "Low usage" staffers who are logged into the system for less than forty hours per month are billed at $192 per year (again on a monthly basis), and there is no charge for users who use the system less than two hours a month. External users, like reviewers or board members, are billed annually at $2,400 total (on a monthly basis). License fees are based on actual usage and the system automatically audits the user type for fair billing.

- **Pricing (small org)**: First Year: $17,000 - $25,000
- **Pricing (small org)**: Annual Recurring: $7,500 - $12,000
- **Pricing (large org)**: First Year: $25,000 - $100,000
- **Pricing (large org)**: Annual Recurring: $12,000 - $20,000

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocation if the categories are tied to the budget.
- **Splitting Categories**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, organizational records, and personal profiles, including Word documents, Excel spreadsheets, and PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program, and grant cycle. The vendor has added considerable enhancements around searching.
- **Handling Paper Applications**: Applications received as paper can be easily entered into the system from the new applications area of the Submission Manager. Forms can be filled in PDF and the data imported back into the system.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database. The system also supports Google Drive as an alternative to the vendor's server(s).

- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: The system has support for the NTEE syntax within the system, and the vendor is willing to work with clients to incorporate other taxonomies into the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create an unlimited amount of online applications with file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create unlimited different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 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 many other stages as needed. The system also supports branching at the point of registration.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The vendor reports that grantees or applicants can transfer their account and history to new staff contact if a foundation's business rules allow for this.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages.
- **Spell Checking**: Grantees can easily spell-check applications and all attachments.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals. The auto-save interval is configurable.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. Clients can opt for manual approval of registration requests or to allow applicants with accounts to create their own additional accounts for their organization.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant which includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers. The vendor also provides a standalone Android app.

- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: The vendor reports that the platform allows for applicants or grantees to manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows the grantee to work on a proposal, save it as a draft, allow a reviewer to comment or make suggestions, and then work back and forth until a proposal is complete. For instance, a reviewer could add a note visible to the applicant, and configure a trigger to alert the applicant of the note's existence. As of the publication of this report, the vendor has launched an update to the system, which provides the ability to add field-level comments to submitted application.
- **Security Scan for Uploaded Documents**: Offers a full virus scan feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation. You can also fully match the style sheet of your foundation's website.
- **Character and Word Counts**: The system includes character and word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes in-system help text editable by the foundation staff. Help text can be presented either in-line or as tool-tips.

Application Review

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

- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, either via email or internal message, or both.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) 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. Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. Provides updates based on the revocation list. The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status, and includes date and time stamp, which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC, SDN, and other terrorist watch lists within the grants management system itself. The OFAC check is supplied by OFAC Analyzer and includes date and time stamp which can serve as an audit trail demonstrating completion of due diligence step(s). Lets you perform checks and updates in batch.
- **Manual Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself, through the Simplify Initiative.
- **Documentation for Organization Lookup**: The vendor provides documentation showing clients how to export the necessary grants data with the Foundation Center through the API on the system wiki.

Letters and Board Dockets

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

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent as blind copies, but rather as one-to-one to minimize the likelihood of being caught in a spam filter.
- **Email Template Flexibility**: Lets you create emails for individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. You cannot edit one-off emails from a batch sent out based on a template.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the open rate, click-through rate, and unsubscribe rate for each email. You also can see the number of people who clicked on each link and bounce reports.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission. Email configuration is done through the workflow engine.

- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Lets you schedule emails based on date or elapsed time. Email configuration is done through the workflow engine.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam. Alternatively, email can be sent through the client's email servers or through third party email services, which may require an additional fee.
- **Spell Checking**: Lets you spell check emails within the system.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email a reporting reminder to a report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field. Each grant in the system has its own unique email address to capture messages related to that grant.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements by program and customize them for individual grantees. A grant can be associated with any number of pre- and post- activities.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Lets you automatically email grantees to remind them about upcoming deadlines and pull field information from requirements into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.

- **User Groups**: The system can support user groups to collect uniform data for evaluation purposes through a variety of means, including manual grouping of organizations, cross tab views, and ad hoc reporting.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but it's not possible to print a check directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Integrates tightly with QuickBooks, Sage 300 (formerly Accpac), and SAP. The vendor states they can also facilitate 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system can automatically generate a repayment schedule for PRIs, using the same scheduling functionality as for payments. ACH payments are not supported for interest repayments.
- **Payment Notes**: Lets you include notes on payments, which can be made private for certain users or public for all users to see.
- **Payment Reporting**: Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments and place payments on hold as statuses within the system. There's no default ability to track quid pro quo and in-kind payments, although this could be tracked in custom fields. There's no ability to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount and disbursements for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes. You can also manage multiple budgets and draw funds on a per-grant basis.
- **Multiyear Budgeting**: Lets you easily set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios by creating and saving a new budget as a draft.
- **Budgeting and Grant Requests**: Budgeted line items can create grant requests and feed directly to disbursements.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system supports interest repayment on PRIs.

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently. There is also a more advanced reporting sub-system for expert users.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports and queries without navigating a much larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include, and filter by, nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers, but some formatting requires HTML/style-sheet expertise. The system also supports ad hoc reporting from nearly any field displayed to users by exporting data to Excel for formatting.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Lets you search the contents of file attachments.
- **Automating Reports**: Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user. Users can create their own dashboards. Any data point within the system can be aggregated across the system and made into a report or dashboard, and users can monitor indicators personalized to them.
- **Industry-Standard Reporting Templates**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center reporting Excel format, Reporting Commitment hGrant format, and IATI.

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

Data Access

- **Data Export**: 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. Web services, AJAX, and .Net APIs are provided.
- **Mobile Device Application Review**: Provides a responsive interface specifically designed to see, code, approve, and add review comments from a mobile or tablet device. Provides a standalone app for Android devices that allows for application review.
- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device. Provides a standalone app for Android devices that allows you to see grant summary and grant details from a mobile or tablet device.
- **Data Integrity**: The vendor reports that the system protects the integrity and security of data within the system through the use of redundant hardware, uninterruptible power supplies, certain types of RAID arrays, error-correcting memory, use of a clustered file system, using file systems that employ block level checksums.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code, as well as change field types.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields, and you can track the creation or change of custom fields in a log for historical documentation.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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

Support and Training

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

Installation and Maintenance

- **Installation and Maintenance**: This online hosted system is accessible from any major web browser. There are three hosting options: 1) Multitenant: Vendor hosts multiple clients on one server; 2) Dedicated server: Vendor hosts SmartSimple for client on a separate server and 3) Self-hosted. The client hosts SmartSimple on its own server, which can be either Windows, Amazon, or Linux-based.

Vendor Background

- **History**: The vendor has been in business since 2002. SmartSimple GMS360° has been in use since 2004
- **Client Base**: The vendor reports that it has 67 clients for GMS360°. The breakdown by type of grantmaker is: 19% government, 27% corporate foundations, 22% independent organizations, 13% family foundations, 9% community foundations and 1.5% charities.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it. The company is managed by the founding ownership team. There is no debt financing and no outside investments.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 3
- **Percent of Survey Respondants who Would Recommend the system**: 76 percent.
- **Training Score**: 0.94
- **Implementation Score**: 0.97
- **Support Score**: 1.01

SUBMITTABLE

Submittable is an easy-to-use and affordable solution for foundations to set up, track, and review online applications and other forms. Online forms can be extensively formatted with a variety of field types, and the resulting applications and grants can be easily coded and searched with a large number of user-defined labels. Submittable includes generally strong application review functionality, with a variety of scoring schemes and the ability to display average scores, but does not include any automated workflow. Lack of any payment tracking functionality and budget support will disappoint some organizations, as will significant limitations on system reporting. Submittable offers several annual subscription options for grantmakers, starting at $3,300 for up to 50 staff members and 1,500 submissions per year.

- **Pricing (small org)**: First Year: $3,300
- **Pricing (small org)**: Annual Recurring: $3,300
- **Pricing (large org)**: First Year: $3,300
- **Pricing (large org)**: Annual Recurring: $3,300

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can label grant records to display program cycle or board meeting date, but these labels cannot be used for reporting.
- **Tracking by Categories and Codes**: Can label grant records by categories, such as geographic or population-based codes, but these labels cannot be used for reporting.
- **Splitting Categories**: Does not let you split grants across different codes or categories.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information like project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets or PDFs as well as images and video.
- **Searching for Grant Records**: Grants and applications can be searched by title, submitter name, label, assignee, and status.
- **Handling Paper Applications**: Applications received as paper can be easily entered into the system without the need to log in as the applicant.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no support for an industry-standard taxonomy within the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

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

- **Number of Online Application Forms**: Lets you create unlimited online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes cannot branch to multiple applications, but they can branch to different forms within an application.
- **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**: Does not support multiple application stages. Foundation staff can request additional information from grantees after the application has been submitted using the Additional Forms functionality.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: It's not possible for a grantseeker to can transfer their account and history to another persion within that organization. An administrator at the foundation can make the transfer on the back end.
- **Reuse of Application Data**: Grantees must re-enter information that is asked for in both a Letter Of Intent and a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal 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.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: Applicants enter email address and password on first visit, and are automatically registered in the system.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or download applications at any stage in the process.
- **Preview Packet**: The preview packet does not include uploaded documents.
- **Mobile Device Application Access**: Application forms are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not by default have the ability to allow grantees and reviewers to both comment and collaborate on a proposal before submission.
- **Security Scan for Uploaded Documents**: The system does not have a virus scan or security feature to prevent malicious files from being uploaded into an application or downloaded into the system.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms with your logo, font and colors. The vendor can customize the forms to match the look and feel of your website, at additional cost.
- **Character and Word Counts**: Administrators can specify word counts for text areas on applications.
- **In-System Help for Applicants**: The system provides a standard FAQ list for applicants, as well as a help desk and support ticketing system. The vendor provides technical support for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined or been granted in the past.
- **Requirements Checklist**: There's no specific checklist functionality, but grantors could create a user defined form that contains a checklist, which could be attached to the grant record.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: The system lets reviewers easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Submitted applications can be automatically assigned to reviewers by label or category, but you can not otherwise 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 through a field on the reviewer profile, 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, but not their 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.
- **Manual Organization Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.
- **Mail-Merge Fields in Letter Templates**: Lets you 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**: The system itself does not let you print letters or summaries for a series of grants or grant applications in a single step, but the vendor reports this can be done through third-party software.
- **Pre-Print Viewing and Customization**: The system itself does not let you view and customize individual letters before printing them, but the vendor reports this can be done through third-party software.

- **Board Docket Attachments**: The system itself does not let you attach documents to a board docket, but the vendor reports this can be done through third-party software.
- **Electronic Signatures**: Applicants can agree to Terms and Conditions, but the system does not support electronic signatures with an external approval process.
- **Electronic Templates**: Includes templates for email, but not print formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Lets you see the number of emails successfully sent and the recipients, but not the open rate, click-through rate, and unsubscribe rate for each email, nor the number of people who clicked on each link and bounce reports 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**: Does not let you set up scheduled email reminders to applicants and grantees. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Outbound Email Method**: Emails are sent through the vendor's email service.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: Does not meet this criteria.
- **Tracking Organizational Grant History**: Organizations and individual grants are tracked together; users can see a history of all grants to particular organization through the search functionality.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization.
- **Multiple Contacts Per Organization**: Lets you associate just one contact for each grant application.
- **Customized Communication by Contact Role**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook, but vendor reports this can be done via an API.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements that applies to all grantees, but those requirements cannot be customized for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: From the grant application you can see which requirements have been met.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. It is not possible to view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online forms.

- **Deadline Reminder Emails**: Cannot automatically email grantees to remind them about upcoming deadlines. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Progress Report Tracking**: Cannot currently track both that progress reports have been received and that they have been approved by staff. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Storing Progress Report Data**: You cannot store progress report information submitted by grantees in multiple data fields; you can only store progress reports as an document attached to the original application.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system does not support user groups to collect uniform data.
- **Overall Approach to Outcomes Reporting**: The system does not provide a method for foundation staff to report on grantee impact.

Payments:

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: The system does not support scheduled payments.
- **Check Requests**: Cannot generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Not applicable as the system includes no native support for scheduled payments.
- **Schedule-Based Payment Viewing**: Not applicable as the system includes no native support for scheduled payments.
- **Third-Party Payee Support**: Not applicable as the system includes no native support for payments.
- **Electronic Payments**: Not applicable as the system includes no native support for payments.
- **Viewing Payments Made**: Not applicable as the system includes no native support for payments.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Not applicable as the system includes no native support for payments.
- **Multi-Currency Support**: Not applicable as the system includes no native support for payments.
- **Multi-Currency Reporting**: Not applicable as the system includes no native support for payments.
- **Contingent/Conditional Payments**: Not applicable as the system includes no native support for payments.
- **Payment Controls**: Not applicable as the system includes no native support for payments.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: Not applicable as the system includes no native support for payments.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: Not applicable as the system includes no native support for payments.
- **Viewing Payment Schedule Online**: Not applicable as the system includes no native support for payments.
- **Other Payment Issues**: Not applicable as the system includes no native support for payments.

Budgeting

- **Budget Tracking Configuration**: Budgeting not supported.
- **Budget Amount Reporting**: Budgeting not supported.
- **Hierarchical Budget Tracking**: Budgeting not supported.
- **Basing Budgets on Past Years**: Budgeting not supported.
- **Multiple Programs Per Grant**: Budgeting not supported.
- **Multiyear Budgeting**: Budgeting not supported.

- **Drafting Budgets for "What-If" Scenarios**: Budgeting not supported.
- **Budgeting and Grant Requests**: Budgeting not supported.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on PRIs.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you run one of three pre-packaged basic reports, such as the list of grants currently being reviewed, but not customize the reports or data shown in any way.
- **Report Modification**: You cannot modify standard reports.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports without navigating all standard reports, but there are only three standard reports available.
- **Saving Modified Reports**: Does not let you modify standard reports or create ad hoc reports.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel or a separate reporting tool for formatting.
- **Grant Summary Tracking**: Cannot track or report summaries based on any codes—for example, to show grant money paid for a set of geographical region.
- **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.
- **Automating Reports**: Reports cannot be set to run and send automatically.
- **Visual Reports**: It's not possible to create, view, and export data in a visual graphic representation (e.g., charts, graphs) other than those available in the standard reports.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: Does not contain report templates to easily align data with reporting standards used by the sector.

Roles and Permissions

- **Permissions Granularity**: You can affiliate users with one of the five 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. Select fields on application forms can be hidden from reviewers.
- **Role-Based Interfaces**: Provides five different internal interfaces 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**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Does not assign tasks to users based on rules and roles.

Data Access

- **Data Export**: Lets you export all data visible to users into .csv format.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to an external system. The API only allows for read-only permissions, and cannot be used to create a custom data feed from an external system.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices, but the entire interface is responsive.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device, but the entire interface is responsive.
- **Data Integrity and Security**: System data is stored on Amazon's AWS servers. The vendor reports that the integrity and security of data within the system is protected through multiple webservers, mirrored databases, daily backups, as well as backups to another Amazon AWS region on a daily basis.

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 Fields**: Users can add or rename fields for forms, but it is not possible to add or rename fields in the system interface itself.
- **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.
- **Support for Multiple Languages**: Lets you define custom language sets for public-facing forms, but not for the admin interface.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 without additional cost.
- **Online Support**: Vendor provides unlimited online support without additional cost.
- **Manuals and Documentation**: The vendor provides a searchable Knowledge Base for the system online, including help articles and training videos.
- **Training**: The vendor provides initial training and a higher level of support at an additional cost.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This hosted system is accessible via a web browser. All major web browsers except Internet Explorer are supported.

Vendor Background

- **History**: The vendor has been in business since 2009. The system has been in use by clients since 2010.
- **Client Base**: The vendor reports they have about 9,000 clients, approximately 250 of which are foundations of varying sizes. The vendor does not provide a client breakdown by foundation type.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.
- **Customer Experience Survey**:
- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

VERSAIC GRANTS

The Versaic platform is used by a number of corporate philanthropic departments to manage grantmaking, product donations, and sponsorships. Versaic Grants is a highly flexible platform built on Microsoft's .NET business application framework, and the vendor provides consulting services for clients including configuration of online forms, batch updates, and ongoing tech support for applicants and grantees. Reporting is very strong in the system and it has powerful internal workflows that can help segment applications based on programs and automatically route them to the right staffers. Since the last time Idealware reviewed this system, the vendor has added support for automatically checking 501(c)(3) and OFAC status though GuideStar's CharityCheck, but you cannot see email delivery statistics for system-generated email sent through the vendor's servers. The Versaic Grants solution can be implemented for $10,000 and up, with subscription fees of $15,000 and up per year for small foundations. For larger foundations, the vendor quoted a minimum implementation cost of $20,000, with annual subscription fees starting at $40,000.

- **Pricing (small org)**: First Year: $25,000 and up
- **Pricing (small org)**: Annual Recurring: $15,000 and up
- **Pricing (large org)**: First Year: $60,000 and up
- **Pricing (large org)**: Annual Recurring: $40,000 and up

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Grant information is not tracked by program cycle or board meeting date by default, but this can be configured by the vendor at implementation.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, as well as across specific percent or dollar allocations.
- **Splitting Categories**: You can split grants across program codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and .PDFs.
- **Searching for Grant Records**: 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 as paper can be entered into the system either by duplicating an existing application or creating a new application and entering the information.
- **File Attachment Method**: The system uploads attached documents to the server and stores a link to that uploaded file in the database.
- **Batch Updates to Grant Records**: Batch updates are possible, but must be handled by the vendor.
- **Support for Industry Taxonomy**: The system can automatically fill in an organization profile, including the assigned NTEE code, using a tax ID lookup.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you collect application information online, but vendor must set up application forms for you—there's no additional cost for most typical applications.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations. Applications can then be sent to different mailboxes for routing to the proper staffer on the back end.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and as many other stages as needed.
- **Online Application Integration**: Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal. Foundation staff can choose which fields can or cannot be automatically filled from prior applications.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative. This functionality is not enabled by default—foundation staff must turn this on in the "Questions Library".
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Applications are configured by the vendor.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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. Applicants are warned when their application is going to timeout.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. There's a registration check for security and to confirm the email address.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials—this process is highly configurable.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents, or links to them.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet, although the administrative interface is fully functional on a mobile or tablet device.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match.
- **Unified Accounts Across Grantmakers**: There's no current means for applicants or grantees to manage all grant information for all of their funders in the system, but the architecture of the software could support this, and the vendor reports that this is on the product roadmap.

- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to return submitted applications to applicants, with comments, multiple times for more information or edits. Applicants and reviewers cannot work together on a proposal in draft form prior to submitting, but reviewers can restore submitted proposals to draft status.
- **Security Scan for Uploaded Documents**: The system performs an anti-virus scan on all documents uploaded into the system.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation. Vendor provides ongoing configuration as part of the annual fee.
- **Character and Word Counts**: The system includes character counts for application questions by default, and displays prominently how many characters remain. The vendor can enable word counts for application questions, by request. An administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes in-system help editable by the vendor. Grantees and applicants can contact the vendor directly for technical assistance.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or were granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: The system lets reviewers view selected documents associated with the request and stored in the system. Files in ..PDF or other image formats can be viewed directly within the system itself, but files in other formats need to be downloaded and opened on the reviewer's desktop.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process and throughout the system on a very sophisticated level.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: The system would need to be customized in order to track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review, as well as to track reviewers and applications by geography or other criteria defined by grantmaker for making assignments.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed, including by only a portion of the assigned reviewers if that is a desired workflow. The system can send notification within the system and via email.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry and flags those not listed. The system checks against GuideStar Charity Check. Provides updates based on the revocation list. The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status. The vendor can perform checks and updates in batch.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself, through GuideStar CharityCheck.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar CharityCheck data for organizations within the system itself.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor provides current documentation showing clients how to access GuideStar CharityCheck data in the system.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries and choosing which fields to include, as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. You can also create mailing labels.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket by generating a single merged ..PDF file with all related files for each grant summary.
- **Electronic Signatures**: The system provides electronic signatures tied to a username and password and that are time-stamped, which may be used to show legal nonrepudiation. These are not externally verified.
- **Electronic Templates**: Includes templates for print and electronic formats.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria. Emails are sent one-to-one from a no-reply address to avoid spam filters.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data, and then edit the emails after they have been merged. You can add logos and other graphic elements through HTML.
- **Email Attachments**: Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting**: Does not let you see email delivery statistics within the system itself.
- **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 and a variety of other criteria.
- **Outbound Email Method**: Emails can be sent through third-party email services or through clients' email servers and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: The system could be configured to let you keep a record of an individual no longer associated with a grant within the system's audit trail, and not show up as an active contact for communication.

- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact or email reporting reminder to report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant, but it's stored in the entire audit trail with all the rest of the information about the grant.
- **Call and Email Logging**: Lets you note interactions with a grantee in a single comment field, but does not support a more detailed communications log.
- **Email Capture**: Does not currently let you capture emails from an external email system, although this could be customized.
- **Contact Synchronization**: Does not currently synchronize contacts with Outlook, although this could be configured by the vendor at implementation.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you branch to different progress report forms based on type of grant program.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: Foundation staff can view both original outcome goals and grantee responses from submitted progress reports on the same screen by downloading the provided Excel templates.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields on the grantee portal, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines and merge field info from the requirement into reminder emails.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff.
- **Storing Progress Report Data**: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports, including numerical evaluation results.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: Supports program-based user groups in order to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress toward those goals using submitted progress reports. This can be achieved in the system using custom SSRS reports, or in Microsoft Excel using grant summary templates provided by the vendor.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants. The vendor could adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.

- **Check Requests**: Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers, but you need to manually enter information and confirmation codes for successful transactions. It is possible to record confirmation codes for successful transactions by integrating with an external accounting package.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check number/ACH payment/wire transfer number.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages. However, most of its clients do not choose to integrate accounting systems.
- **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 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: Lets you pull reports on payments that carry the coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Lets you display the payment schedule for their award(s) online through the grantee portal, with customization, including both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments, refund payments, and place payments on hold through statuses with workflows associated with them. Lets you track quid pro quo and in kind payments, through configuration. It's not possible to update payment details or create payments (e.g., general ledger account, fund, etc.) in batch, although the vendor could do so.

Budgeting

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

- **Budgeting and Grant Requests**: Budget line items are connected to grant requests.
- **Tracking Repayments for Program-Related Investments (PRIs)**: There's no current support for interest repayments on PRIs, but the vendor is willing to configure this for clients if needed.

System Querying and Reporting

- **General Reporting Approach**: The system uses Microsoft SSRS reporting technology as its infrastructure. The vendor helps configure and customize complex reports for foundations, and provides reporting templates for Microsoft Excel.
- **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 updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs, but the vendor must upload the new versions for you.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports, queries, and actions without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports, which can include nearly any field displayed to users. This functionality depends on templates built in Microsoft Excel, which can be configured and uploaded by either the client or vendor.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Vendor would need to configure the system to have reports automatically run and sent to individuals and groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation—e.g., charts and graphs.
- **User Dashboards**: The system provides some basic dashboard views that summarize the information currently relevant to each individual user. The vendor creates them for you. Lets users have their own multiple unique dashboards.
- **Industry-Standard Reporting Templates**: The system contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI. The vendor or foundation staff can create and upload custom reporting templates.

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 either a functional or 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 of 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 with a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members through system customization.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: Lets you export all data visible to users into another file format, such as .xls or .csv
- **Custom Data Feeds**: The vendor can provide custom data flows to an external system.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices, but interface is fully mobile and tablet responsive.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device, but interface is fully mobile and tablet responsive.
- **Data Integrity and Security**: The system protects sensitive data and any data that a customer requests be encrypted through Microsoft SQL server protocols. All sensitive data transferred over the Internet is encrypted using 40-bit to 128-bit SSL 2.0 encryption, depending on browser settings. Versaic's hosting provider is both SAS 70 Type II and SSAE 16 certified.

Overall Customization

- **Dropdown Fields**: The vendor would customize dropdown values for fields.
- **Internal Tracking Fields**: The vendor would customize internal tracking fields for staff use.
- **Custom Fields**: The vendor can create custom fields and provide an audit log.
- **Online Information Customization**: The vendor would customize online application and review forms.
- **Vendor Customization**: Vendor will extensively customize system to your needs.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: Lets you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

Ease of Use

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

Support and Training

- **Phone Support**: The vendor provides unlimited phone support for every user at no additional cost. The vendor provides a dedicated "client success manager" for each client.
- **Online Support**: The vendor provides unlimited email and web meeting support for every user at no additional cost. The vendor provides a dedicated "client success manager" for each client.
- **Manuals and Documentation**: The vendor provides an online knowledge center with user manuals and documentation, including tutorials, screenshots, and videos.
- **Training**: The vendor provides all initial and ongoing training for every user. All system configuration changes are included as part of the subscription, and the vendor also provides consulting services to ensure all changes meet client requirements. The vendor provides a dedicated "client success manager" for each client.
- **User Support Forums**: There are no user support forums at this time.

Installation and Maintenance:

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

Vendor Background

- **History**: The vendor has been in business since 2000; Versaic Grants has been in use by clients since 2010.
- **Client Base**: The vendor reports that it has about 125 clients, most of which are corporate.
- **Sustainability**: "The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it."

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 34
- **Percent of Survey Respondants who Would Recommend the system**: 97 percent.
- **Training Score**: 1.56
- **Implementation Score**: 1.23
- **Support Score**: 1.32

WEBGRANTS

WebGrants is a well-designed mid-priced 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. Since Idealware last reviewed this system, the vendor has added support for forms that can branch based on form entries. It also reports that a new responsive interface will be available in late 2016. 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 the vendor must configure the system to allow administrators to search on more than just the basic grant record 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 either the user's or vendor's Internet servers—the vendor charges an annual hosting fee of $6,600 if using its servers. The license fee is typically between $15,000 and $45,000, depending on the size of the client, the level of configuration needed, and what additional modules are purchased.

- **Pricing (small org)**: First Year: $20,000
- **Pricing (small org)**: Annual Recurring: $13,200 - $18,800
- **Pricing (large org)**: First Year: $245,000
- **Pricing (large org)**: Annual Recurring: $13,200 - $18,800

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and run a report to view the specific percent or dollar allocations across each.
- **Splitting Categories**: Lets you split grants across different funds, but not by categories or codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information such as project names or codes throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, and PDFs.
- **Searching for Grant Records**: 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 through the "people" database. An 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 to Grant Records**: Does not let you perform batch updates of defined coding and other fields, except to update grant status. The vendor can import bulk data by spreadsheet by request on a client-by-client basis.
- **Support for Industry Taxonomy**: There's currently no support for an industry-standard taxonomy within the system, but the system could be configured to do so.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages**: The system supports two application stages, including a scorable eligibility quiz and a final application stage.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: There's no ability for a grantee or applicant to transfer account and history to new staff contact, but this can be done by a grantmaking staffer.
- **Reuse of Application Data**: Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.
- **Application Autofill from Tax Record**: Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that this could be customized on a client-by-client basis, as part of implementation.
- **Viewing Proposal 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.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The preview packet includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system does not explicitly support the application process via mobile or tablet. The vendor reports that the new interface, available in late 2016, will be responsive.
- **Duplicate Accounts**: There is a process for grantmakers to review applications to look for and merge duplicates.
- **Unified Accounts Across Grantmakers**: Applicants/grantees are able to manage all grant information for all funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system does not by default have the ability to allow grantees and reviewers to both comment and collaborate on a proposal before submission, although reviewers can view draft applications prior to submission.
- **Security Scan for Uploaded Documents**: Offers virus scan to prevent malicious files from being downloaded onto system.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation, including advanced online form design, such as HTML and hyperlinks and columns.
- **Character and Word Counts**: The system includes character but not word counts for application questions, and an administrator can set and adjust character limit for any field. The vendor reports that the ability to set and display word counts for application questions will be available as part of the new interface, in late 2016.
- **In-System Help for Applicants**: "Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms. The vendor asks the foundation to be the ""first line of defense"" for applicant inquiries, but can take on technical inquiries as needed.

Application Review

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

501(c)(3) and OFAC Status

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

- **Manual Lookup Through GuideStar**: Does not let you access GuideStar data for organizations within the system itself.
- **Documentation for Organization Lookup**: Does not let you access GuideStar data for organizations within the system itself.

Letters and Board Dockets

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

Emails

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

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not let you track individual business units under a larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, send the payment letter to the payment contact, or email a reporting reminder to a report contact—through role-based communication.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant.

- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system automatically.
- **Contact Synchronization**: System allows you to automatically synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met, and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen through custom reports or adding custom fields on the grant record.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **Deadline Reminder Emails**: Can automatically email grantees to remind them about upcoming deadlines and merge field information from grant requirements into reminder emails for grantees.
- **Progress Report Tracking**: Can track both that progress reports have been received and that they have been approved by staff. Storing Progress Report Data: Lets you store progress report information submitted by grantees in multiple data fields, which you can then summarize across grantees in reports.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees, but this doesn't include any suggested formats.
- **User Groups**: Does not support user groups to collect uniform data consistent with other groups.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants, and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals, and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: Can generate a paper check request for accounting, but not print checks directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with external accounting software packages, but vendor is willing to integrate at additional cost.
- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.

- **Multi-Currency Support**: Supports grants made in multiple currencies by storing currency and exchange rate information.
- **Multi-Currency Reporting**: Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments**: Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls**: Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The vendor can configure the system to support interest repayments on PRIs, using the same scheduling functionality as for payments.
- **Payment Notes**: Lets you include notes on payments through Claims Annotations.
- **Payment Reporting**: Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues**: Lets you void payments, make refunds, and place payments on hold, but these are simply statuses that don't synch with accounting. Lets you update payment details (e.g., general ledger account, fund, etc.) in batch and create payments in batch. Lets you track matching gifts, but there isn't the ability to track in-kind and quid pro quo payments.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Cannot modify standard reports beyond choosing what set of data should be displayed.
- **Favorite Reports, Queries, and Actions**: Cannot quickly view favorite reports, queries, or actions without navigating a much-larger set. The vendor reports that the ability for individual users to save favorite reports, queries, or actions to their dashboard will be available as part of the new interface, in late 2016.
- **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. It also has the ability to use calculated fields in ad hoc reports (i.e., use searches or filters on individual columns) and can create ad hoc top N (ranking) and summary (roll up) reports.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.

- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: The system doesn't have the ability for reports to automatically run and be sent to individuals or groups.
- **Visual Reports**: The vendor can configure the system to let you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: The system does not currently provide "dashboard" views to summarize the grants currently relevant to each individual user. The vendor reports that the ability for individual users to create their own personalized dashboards will be available as part of the new interface, in late 2016.
- **Industry-Standard Reporting Templates**: The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, and IATI.

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. Read only or dashboard views can now be set up for certain users.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: All users see the same view of information; no "dashboard" views are currently available. The vendor reports that the ability for individual users to create their own personalized dashboards will be available as part of the new interface, in late 2016.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users within a certain grant.
- **Board/Management View**: Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: 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 browser. The vendor reports that the new interface, available in late 2016, will be responsive.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser. The vendor reports that the new interface, available in late 2016, will be responsive.
- **Data Integrity**: The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: There's no limit to custom fields, and they are indistinguishable from system-standard fields. Lets you track creation and change of custom fields. Lets you customize field names.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via access to underlying database and/or code (as allowed through the API).
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: The system supports multiple languages for both front-end forms and the admin interface, using Google Translate.
- **Customization by Foundation Staff**: Virtually all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 them.
- **Easily Taking Action**: On the core interface pages, the user can find the actions he or she is most likely to take, but users 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.
- **Online Support**: "Vendor provides unlimited email support without additional cost. The online help consists of custom system documentation that each customer receives.
- **Manuals and Documentation**: The vendor provides customer specific and updated documentation at the end of the project.
- **Training**: The vendor provides in person or remote training at the client's request.
- **User Support Forums**: There are no support forums available for this system.

Installation and Maintenance

- **Installation and Maintenance**: This online hosted system is accessible from any major web browser. Clients can host the system locally on their own servers, or can the vendor can host on its own servers, for an annual fee of $6,600.

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 it has more than 70 clients. Breakdown by foundation type is 50% government, 20% charity, 10% university, 10% art, 10% other.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 26

- **Percent of Survey Respondants who Would Recommend the system**: 73 percent.
- **Training Score**: 0.98
- **Implementation Score**: 0.90
- **Support Score**: 1.04

WIZEHIVE

WizeHive's Grants Management System offers a combination of features and affordable pricing that will make this online hosted system an attractive option for smaller grantmakers. For larger or more complex organizations, WizeHive Grants Management System can be integrated with the newer Zengine platform, offering increased automation and flexibility along with extensibility and integrations. Granst Management System scores well in grant tracking and online applications, and easily configurable grant review workflows bolster an already solid application review process. However, Granst Management System is less strong when it comes to creating letters or other print communications, as there is no mail merge functionality. Since we last reviewed the system, the vendor has improved the reporting functionality, adding the ability for users to save their personal custom reports and settings to an easily-accessible "favorites" list, and support for charts, graphs, and other visualizations based on report results. An organization with five users, 10 grants per year, and only light online application and review functionality could pay as little as $2,998 depending on the level of customization needed. An organization that receives more than 500 applications annually, and more-robust donor management capabilities, might pay closer to $7,000 per year. Additional granting programs are possible with an additional yearly fee.

- **Pricing (small org)**: First Year: $2,998 – $10,788, dependent upon level of customization.
- **Pricing (small org)**: Annual Recurring: $2,998 – $10,788, dependent upon level of customization.
- **Pricing (large org)**: First Year: $2,998– $24,995, dependent upon level of customization.
- **Pricing (large org)**: Annual Recurring: $2,998 – $24,995, dependent upon level of customization.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes. It's possible to build reports to show the specific percent or dollar allocations across these codes.
- **Splitting Categories**: It's not possible to split grants across program codes without customization.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs, among others.
- **Searching for Grant Records**: 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 as paper can be entered into the system easily by starting a new application. Copies of the physical application can be scanned and saved in the system as a .PDF or image file.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no built-in compliance for an industry-standard taxonomy in the system. Users have the ability to customize system menus and field labels to match a standard taxonomy.
- **Ability to View Related Records and Data Across Records**: It's possible to view an organization's payment history by creating a custom form to capture that data from the organization. The results of forms are included in system reports.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: It's possible for eligibility quizzes to branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: The client has the ability to add a form to the applicant portal to allow a grantee or applicant to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through customization. This requires the user or vendor to define a custom data feed with the third-party database of their choosing.
- **Viewing Proposal Status Online**: Applicants can view their status online.
- **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 for Online Applications**: Grantees can easily spell check applications.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system maintains different versions of each form optimized for computer or mobile viewing.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system. However, they will have to log in from each funder's portal separately.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers and applicants to work back and forth on a proposal through forms within the system.
- **Security Scan for Uploaded Documents**: The system itself does not scan files for viruses at upload.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Forms can also be embedded in your website as iFrames.
- **Character and Word Counts**: The system includes character and word counts for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In-System Help for Applicants**: The system provides a standard FAQ list for applicants. Clients have the ability to customize the text around an application form to provide additional instructional text.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Lets external reviewers print out full grant application information by converting applications and support materials into a .PDF file or through a mail merge, but not summaries of grants. Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: Reviewers can easily view uploaded documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process. The system includes three pre-built workflows which can be used as templates. The client can set conditions for workflow override.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs. Scoring schemes can be customized by the client.
- **Online Application Review**: Supports online viewing and reviewing of applications.
- **External Reviewer Profiles**: Lets you track external reviewers' interests and potential conflicts of interest and use those criteria to assign applications for review.
- **Comment Sharing Among Reviewers**: Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores**: Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification**: Proposal owner and grants management staff can be automatically notified when reviews are completed.

501(c)(3) and OFAC Status

- **501(c)(3) Status Checking**: Lets you click on organizations to view their records and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar. The system supports tax verification for all 501(c) types.
- **OFAC Status Checking**: Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. Checks the Specially Designated Nationals (SDN) list.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself.

- **Documentation for Organization Lookup and Data Initiatives**: The vendor does not provide documentation showing how to set up or access GuideStar data in the system through the Simplify Initiative. The vendor activates the Simplify Initiative integration and provides user training for this at implementation.

Letters and Board Dockets

- **Default Print Format**: Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Lets you export letter or summary information for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system does not support third-party electronic signature services such as DocuSign.
- **Electronic Templates**: The system includes templates for electronic templates by default. The client can define print templates through Microsoft Word.

Emails

- **Emailing Individuals and Groups**: Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility**: Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments**: Does not let you attach files to emails.
- **Email Delivery Reporting**: Does not let you see email delivery statistics. Users can contact the vendor to request delivery statistics.
- **Event-Triggered Email**: Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email**: Lets you set up and send scheduled reminder emails to applicants and grantees. Emails can be configured to send at a set time after any action, through a custom workflow.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. The system lets you track individuals over time, and the history of the relationship of each individual associated with a grant, even if they leave the organization. Departed staffers can be marked as no longer with the organization through a custom field or tag, which can be configured to exclude them from future communication.
- **Tracking Organizational Grant History**: Users can create and run a report to see a history of all grants to an organization. Report results can be used to populate a new grant application.
- **Tracking Hierarchical Business Units**: The system can only track individual business units under a larger organization by creating subrecords or subforms.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization by allowing applicants to include additional contacts on the application form. Contacts tracked like this can be emailed or included in report results.
- **Customized Communication by Contact Role**: Can send email to any contact recorded in an application form.
- **Record of Correspondence**: Automatically stores a record of all system-generated email for each grant. Phone calls or other communication can be manually recorded as notes.

- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records—for example, by including a special grants management system email address in the bcc field.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements for each program and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system can be configured to prepopulate evaluation forms with benchmark data, but otherwise does not support user groups to collect uniform data.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

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 display this information.
- **Check Requests**: Cannot easily generate paper check requests.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years, but requires you to create a view to display 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 display this information.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions, but requires custom fields.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number, but you have to create a view to do so.
- **Accounting Integration**: Does not currently integrate with any accounting software packages. The vendor can build custom integrations at implementation.

- **Automated Payment Approval Process**: Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support**: Only supports grants in a single currency.
- **Multi-Currency Reporting**: 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on PRIs without the use of custom fields.
- **Payment Notes**: Lets you include notes on payments.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests/organizations/contacts to an accounting system.
- **Viewing Payment Schedule Online**: Lets you display the payment schedule for their award(s) online through the grantee portal, with customization, including both paid and upcoming payments.
- **Other Payment Issues**: In general, payment issues are handled through the client's accounting system. Voided/refunded payments, in-kind payments, or payment details can be tracked in the system through custom fields on the grant record. It's not possible to update payment details (e.g., general ledger account, fund, etc.) in batch or create payments in batch, although you can batch update statuses.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Does not let you track budgets by hierarchical categories or program areas. Vendor recommends exporting data to Excel for hierarchical budget tracking by defined categories or program areas.
- **Basing Budgets on Past Years**: Lets you use previous years' budgets as a base and adjust them for current year, but requires customization at additional cost.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting**: Does not easily let you set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios**: Does not let you set up "what-if" scenarios.
- **Budgeting and Grant Requests**: The system does not have the ability to create grant requests based on budgeted line items in a proposal.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system does not support interest repayments on PRIs without the use of custom fields.

System Querying and Reporting

- **General Reporting Approach**: Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.

- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos, and headers.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants, but this functionality would have to be considered and accommodated during initial setup.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down**: Lets you drill down for more information on some or all reports.
- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: Reports are dynamically generated, but there is no way to automatically send the results of a report to reviewers or users. The system provides a unique URL for report results, which users can share with users or groups.
- **Visual Reports**: Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards**: The system includes a general overview dashboard, but this view cannot be customized by individual users.
- **Industry-Standard Reporting Templates**: The system does not, by default, contain report templates that align with sector-wide reporting standards. The vendor reports that it can build report templates upon client request.

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 for "applicant" and "external review" roles. It is not possible to define user or group permissions on a field-by-field basis for "admin" or "internal review" roles.
- **Role-Based Interfaces**: Provides three different configurable internal interfaces—including one for reviewers and one for applicants in addition to the standard view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user, but you cannot customize the dashboard view.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: The client can create additional review pages, which can be customized to provide a more focused view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles.

Data Access

- **Data Export**: Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Custom Data Feeds**: Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to, but not from, an external system. However, the vendor can create a custom integration with other systems, for additional cost.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.

- **Data Integrity and Security**: The vendor provides robust documentation regarding its security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, at additional cost. The system can also be integrated with the vendor's newer platform, Zengine, also included in this report, to provide additional functionality.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: It's possible for clients to define custom language sets for system navigation and menus or create application forms in multiple languages.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 at no additional cost. Standard response time is one business day. More rapid response times can be purchased at additional cost.
- **Online Support**: Vendor provides online or chat support at no additional cost.
- **Manuals and Documentation**: Documention is provided online in ..PDF and video format. The vendor also provides an online knowledge base with videos and regular webinars on the system.
- **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, 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 any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2008. The system has been in use by clients since 2009.
- **Client Base**: The vendor reports that it has about 750 clients. Breakdown by foundation type is 30% private, 14% family, 6% community, 15% corporate, 30% public, and 2% government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 15
- **Percent of Survey Respondants who Would Recommend the system**: 100 percent.
- **Training Score**: 1.27
- **Implementation Score**: 1.56
- **Support Score**: 1.28

ZENGINE GRANTS MANAGEMENT

Zengine is a hosted, online system by the makers of WizeHive Grants Management System that provides a flexible platform for managing grants on its own or integrated with WizeHive's original product. Zengine provides strong support for tracking grantee history (or that of other constituents), with the ability to track chapters of larger networks of organizations in separate, but related records, and to set rules for which contact at an organization should receive which types of communications—for example, to send payment letters to the designated payment contact. Emails can be set up to send automatically by specific events or at a scheduled date and time, but this requires a third-party plug-in. The reporting engine is straightforward and easy to use, and provides a good selection of options for creating charts, graphs, or other visualizations, and support for online applications is solid. Pricing for the system is dependent on the level of customization needed, but starts at an annual subscription of around $3,000 for a single grant program, including support and basic training.

- **Pricing (small org)**: First Year: $2,998 – $10,788, dependent upon level of customization.
- **Pricing (small org)**: Annual Recurring: $2,998 – $10,788, dependent upon level of customization.
- **Pricing (large org)**: First Year: $2,998– $24,995, dependent upon level of customization.
- **Pricing (large org)**: Annual Recurring: $2,998 – $24,995, dependent upon level of customization.

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes, and by percentage or dollar allocation if the categories are tied to the budget.
- **Splitting Categories**: Lets you split grants across codes.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you easily update basic grant information, such as project names or codes, throughout the process.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: 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 easily into the system by an admin.
- **File Attachment Method**: The system stores attached documents in the database as objects rather than links.
- **Batch Updates to Grant Records**: Lets you perform batch updates of defined coding and other fields through a third-party plug-in.
- **Support for Industry Taxonomy**: The system has support for the NTEE syntax within the system and the vendor is willing to work with clients to incorporate other taxonomies into the system.
- **Ability to View Related Records and Data Across Records**: Lets you easily view related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms**: Lets you create different online forms to support each grant program.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages**: Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Does not support multiple logins for grantees.
- **Transfer of Account and History**: Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Simplify Initiative, using a third-party plug-in.
- **Viewing Proposal Status Online**: Applicants cannot view their status online.
- **Custom Confirmation Messages**: Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting**: Applications are configured by the vendor.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications**: Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving**: Applications in progress are automatically saved at regular intervals.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applications can be viewed or printed by applicants, but only at certain stages.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers**: There's no means for applicants or grantees to manage all grant information for all of their funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system allows reviewers to unsubmit a proposal with comments, or request additional information from the applicant, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents**: The system does not have a virus scan/security feature to prevent malicious files from being uploaded onto the application.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms with your logo, at a minimum.
- **Character and Word Counts**: The system includes character and word counts for application questions, and an administrator can set and adjust character limit for any field.
- **In-System Help for Applicants**: The system includes in-system help text editable by the foundation staff.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: There's no specific checklist functionality, but grantors could create a user defined form that contains a checklist, which could be attached to the grant record.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal**: Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing files**: The system lets reviewers easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support**: Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility**: Supports different information or scoring schemes for different programs.
- **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.
- **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**: There is no in-system support for comparing organizations and individuals against standard OFAC and other terrorist watch lists.
- **Manual Organization Lookup Through GuideStar**: Lets you access GuideStar data for organizations within the system itself through a third-party plug-in.
- **Documentation for Organization Lookup and Data Initiatives**: The vendor does not provide documentation showing how to set up or access GuideStar data in the system through the Simplify Initiative. The vendor activates the Simplify Initiative integration and provides user training for this at implementation.

Letters and Board Dockets

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

- **Mail-Merge Fields in Letter Templates**: Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries**: Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization**: Lets you view and customize individual letters before printing them.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system supports electronic signatures with an external approval process, through integration with a third-party electronic signature service.
- **Electronic Templates**: The system includes templates for emails and letters.

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, through integration with a third-party tool.
- **Schedule-Triggered Email**: Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes. This is done through custom tags on the user record.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, to send the payment letter to the payment contact or email reporting reminder to report contact—through filters and the email template functionality.
- **Record of Correspondence**: Automatically stores a record of all system-generated letters and emails for each grant. This requires an additional plugin, at additional cost.
- **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 requires an additional plugin, at additional cost.
- **Email Capture**: Lets you automatically capture emails from external email systems into grantee or organization records through a Zapier integration.
- **Contact Synchronization**: Does not synchronize contacts with Outlook, but vendor reports this can be done via an API.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements and customize them for individual grantees.
- **Branching for Evaluation**: Lets you "branch" evaluation data collection based on type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: Lets you easily see which requirements grantees have met and which they have not.
- **Tracking Individual Grantee Outcomes**: The system can be configured to report on progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen through custom reports.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields, but not view previously-submitted reports. The vendor reports that this will be available by Fall 2016.
- **Deadline Reminder Emails**: Cannot automatically email grantees to remind them about upcoming deadlines.
- **Progress Report Tracking**: The vendor reports that users can track received and approved progress reports through automated emails only, with third-party integration.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.
- **Supporting Data Collection for User Groups**: The system can support user groups to collect uniform data for evaluation purposes through a variety of means, including manual grouping of organizations, cross tab views, and ad hoc reporting.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming, but you cannot view whether the grantee has met requirements linked with conditional payments without customization.
- **Check Requests**: Can generate a paper check request for accounting with customization, but it's not possible to print a check directly from the system.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule, but you cannot view whether the grantee has met requirements linked with conditional payments without customization.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Does not support ACH payments and wire transfers.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount and date paid.
- **Accounting Integration**: The vendor has experience in integrating the system with external accounting software packages, including Intuit QuickBooks and FreshBooks, at additional cost.
- **Automated Payment Approval Process**: Limited support for payment approval workflows.
- **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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system can be configured to allow users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: The system provides the ability to include notes on payments, through custom fields.
- **Payment Reporting**: The system can be configured to send the coding attributes of associated requests/organizations/contacts to an accounting system.
- **Viewing Payment Schedule Online**: Grantees cannot currently view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this functionality will be available in Q3 of 2016.
- **Other Payment Issues**: The system can be configured to void payments, make refunds, and place payments on hold (but these are simply statuses that don't synch with accounting.) The system can be configured to let you update payment details (e.g., general ledger account, fund, etc.) in batch and create payments in batch. The system can be configured to let you track matching or in-kind gifts or quid pro quo payments.

Budgeting

- **Budget Tracking Configuration**: You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting**: Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking**: Budgets can be tracked in hierarchically defined categories or program areas.
- **Basing Budgets on Past Years**: It is possible to use previous years' budgets as a base and adjust them for current year through customization.
- **Multiple Programs Per Grant**: Can split grants across more than one program for budgeting and payment-tracking purposes, through customization.
- **Multiyear Budgeting**: Lets you set up budgets for multiple years, but you would need to build a custom plugin to create linkages among these.
- **Drafting Budgets for "What-If" Scenarios**: Lets you set up "what-if" scenarios, but only by building a custom plugin.
- **Budgeting and Grant Requests**: It's possible for budgeted line items to create grant requests by building a custom plugin.
- **Tracking Repayments for Program-Related Investments (PRIs)**: The system can be configured to support interest repayment on Program-Related Investments.

System Querying and Reporting

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

- **Attachment Searching**: Does not let you search within attached documents.
- **Automating Reports**: The vendor can configure system to allow reports to be set to automatically run and send to individuals or groups.
- **Visual Reports**: Lets you create and view data in a visual graphic representation such as charts and graphs, but it is not possible to export report results.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format and Reporting Commitment hGrant format.

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 system—for example, an admin view, a board view, program staff view, and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: Provides "dashboard" views that summarize the grants currently relevant to each individual user.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a focused, roles-based view for management and board members that can be customized to meet specific organizational needs.
- **Role-Based Task Assignment**: Assigns tasks to users based on rules and roles, through customization.

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.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices, but the entire interface is responsive.
- **Grant Information Review from a Mobile Device**: Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity and Security**: The vendor protects the security and integrity of data stored within the system through a variety of methods, including a firewall, TLS/SSL encryption, and two-factor authentication. The hosting of the system is provided within the Amazon Web Services Cloud, and uses that provider's robust security protocols and backup procedures.

Overall Customization

- **Dropdown Fields**: Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use
- **Custom Fields**: The system allows for unlimited custom fields, which can be placed nearly anywhere and have the same permissions as system-generated fields.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will customize system to your needs at additional cost.
- **System Extendibility** : Vendor permits clients to extend system functionality via plug-ins.

- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path
- **Support for Multiple Languages**: Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 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 without additional cost.
- **Online Support**: Vendor provides unlimited email support without additional cost.
- **Manuals and Documentation**: The vendor provides an online knowledgebase with manuals and training materials.
- **Training**: The vendor provides initial training via the Internet at no additional cost and additional training sessions can be scheduled.
- **User Support Forums**: There are user support forums or discussion groups available at http://support.zenginehq.com/.
- **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. The Zengine platform has been in use by clients since 2014.
- **Client Base**: The vendor reports it has more than 200 customers using Zengine, including about 20 foundations. Breakdown of WizeHive clients by foundation type is 30% private, 14% family, 6% community, 15% corporate, 30% public, and 2% government.
- **Sustainability**: The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

ZOOMGRANTS

ZoomGrants is a well-laid out, hosted grants management solution centered on requests for proposals (RFPs) and the grant applications submitted in response to RFPs. Grant applications support an eligibility quiz in addition to the application itself, and can include fields for post-grant reporting. The system has robust support for the application process—applicants can manage their proposals and information for all funders using the system using one account, and can carry over contact information and other data from one application to another, or from a Letter Of Intent to a proposal. Only applicants, not foundation staff, can make changes to organizational information. Since the last time we reviewed this system, the vendor has added a global search functionality, and the ability for reviewers to report if they have a conflict of interest in reviewing a particular application, but there is no ability to use that information to match reviewers to applications. Merge fields are supported for emails, and you can schedule payments for individual grantees, but you cannot define a default payment schedule that applies to all awards. Pricing for the system is based on the number of grant or scholarship programs per year, starting at $4,500 per year for one program, including support, unlimited users, and unlimited applications, plus a one-time activation fee of $500. Each additional grantmaking program adds $2,000 annually.

- **Pricing (small org)**: First Year: $5,000
- **Pricing (small org)**: Annual Recurring: $4,500
- **Pricing (large org)**: First Year: $23,000
- **Pricing (large org)**: Annual Recurring: $22,500

Internal Tracking

- **Grant Cycle Linkages**: All information for each grant proposal is linked together through its entire lifecycle.
- **Tracking by Grant Status**: You can easily retrieve grant information and status.
- **Tracking by Program Cycle or Board Meeting Date**: Can track by program cycle or board meeting date.
- **Tracking by Categories and Codes**: Can track by categories, such as geographic or population-based codes.
- **Splitting Categories**: Lets you split grants across different codes or categories.
- **Custom Categorization Codes**: Lets you define custom categorization codes for tracking and reporting.
- **Updating Basic Grant Information**: Lets you update internal grant information throughout the process. Only the grantee can update their contact information or project names.
- **Attaching Files to Grant Record**: Lets you easily attach files to grant records, including Word documents, Excel spreadsheets, or .PDFs.
- **Searching for Grant Records**: Grants and applications are searchable by a number of criteria, including organization's legal name, EIN, application ID, program and grant cycle. The system has the capability to perform a universal search.
- **Handling Paper Applications**: Applications received as 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 to Grant Records**: Lets you perform batch updates of defined coding and other fields.
- **Support for Industry Taxonomy**: There is no support for an industry-standard taxonomy within the system, but the client can define the keywords and categories to match the standard taxonomy it desires.
- **Ability to View Related Records and Data Across Records**: Lets you easily see related records and data across records.

Online Applications

- **Support for Both Individual Applicants and Organizations**: The system allows both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications**: Lets you create new online applications with, at a minimum, file uploads, checkboxes, and text fields without additional charges from vendor. Radio buttons are used in lieu of dropdown fields.
- **Number of Online Application Forms**: Only supports one online application form per RFP, but multiple RFPs can be run simultaneously, and application questions can branch to show a different set of questions.
- **Eligibility Branching**: Eligibility quizzes can branch to multiple applications.
- **Application Branching**: Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages**: The system currently supports two application stages, including an eligibility quiz and a more detailed application stage, as well as a post-funding stage for approved proposals.
- **Online Application Integration**: Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees**: Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History**: The applicant has the ability to change their account information, user ID, and password, or to transfer their account and history to a new staff contact.
- **Reuse of Application Data**: Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record**: Grant seekers cannot currently automatically fill in their organization profile by entering their EIN number. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Viewing Proposal 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, but not multiple pages or rich text.
- **Spell Checking for Online Applications**: The system relies on the browser's built-in spell-check functionality.
- **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.
- **User Registration**: System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials**: Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications**: Applicants can easily view or print applications at any stage in the process.
- **Preview Packet**: The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access**: The system explicitly supports the application process via mobile or tablet, using responsive design.
- **Duplicate Accounts**: The system checks the email address of each new registrant to make sure it doesn't already exist in the system.
- **Unified Accounts Across Grantmakers**: An applicant can use the same account for all funders in the system.
- **Collaboration Between Grantseeker and Funding Organization**: The system can let a grantee work on a proposal, save it as a draft, get comments or suggestions from a reviewer, and work back and forth until a proposal is complete. For instance, a reviewer could add a comment visible to the applicant, and the applicant would be notified of the note's existence by email.
- **Security Scan for Uploaded Documents**: The system itself does not scan files for viruses at upload.

Form Design and Flexibility

- **Look and Feel**: Lets you customize online application forms with your logo, background and text color, and header styles, or you can embed an application form directly in a page on your organization website.
- **Character and Word Counts**: The system includes character and word counts for application questions. Admin users have the ability to set maximum and minimum character limits for each field.
- **In-System Help for Applicants**: The system includes online help for both end users and applicants, including videos and tips. The vendor provides technical assistance for applicants.

Application Review

- **Viewing Relationship History**: Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist**: Supports a checklist to define the information or documents you require from prospective grantees by allowing you to add fields to the grant application that are viewable only to administrators. These fields could comprise a checklist.
- **Reopening Submitted Applications**: Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries**: Reviewers can easily print grant summaries or full grant information by program or date.
- **Reviewer's Portal**: Users in the reviewers group are shown an appropriately limited interface.
- **Viewing files**: Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows**: Does not let you define automatic steps and rules for the grants review process, but administrative users can be automatically notified by email when a review is completed. The review interface provides a progress bar for the reviewer.
- **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. Reviewers can list their availability. The system 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 Employee Identification Numbers against the official federal IRS 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.
- **Manual Organization Lookup Through GuideStar**: Does not currently let you access GuideStar data for organizations within the system itself. As of the publication of this report, the vendor has launched an update to the system that provides this functionality.
- **Documentation for Organization Lookup and Data Initiatives**: Does not currently let you access GuideStar data for organizations within the system itself. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.

Letters and Board Dockets

- **Default Print Format**: Lets you print a view of grant applications that includes the fields and custom fonts, colors, and logos as defined for the original online application form.
- **Mail-Merge Fields in Letter Templates**: Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries**: Does not let you print letters in a single step, but you can print each one individually. It is possible to print summaries for a series of grants or grant applications in a single step, but only by generating a custom report.
- **Pre-Print Viewing and Customization**: You cannot view or customize letters within the system.
- **Board Docket Attachments**: Lets you attach documents to board docket.
- **Electronic Signatures**: The system has limited ability to support electronic signatures through a custom text box and cannot provide independent secure verification.
- **Electronic Templates**: There are no default templates for electronic or tablet view, but the system supports the creation of .PDFs for board meetings. Users can define custom reports to meet this need.

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 currently let you attach files to emails. As of the publication of this report, the vendor has launched an update to the system, which provides this functionality.
- **Email Delivery Reporting**: Lets you see the number of emails successfully sent and the recipients, but not the open rate, click-through rate, and unsubscribe rate for each email, nor the number of people who clicked on each link and bounce reports 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 up to 14 days in advance of an event, but general emails cannot be scheduled to send in the future.
- **Outbound Email Method**: Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking for System-Generated Email**: The system relies on the browser's built-in spell-check functionality.

Relationship Management

- **Tracking Individual History**: It's possible to capture multiple individuals on online forms. Lets you keep a record of an individual's association with a grantee, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History**: Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Hierarchical Business Units**: Does not currently let you track individual business units under a larger organization and see grants for both the individual units and the larger organization. The vendor reports that this functionality is in the development pipeline.
- **Multiple Contacts Per Organization**: Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication by Contact Role**: Lets you communicate with a contact according to their relationship with the grant or organization—for example, to send the payment letter to the payment contact or email reporting reminder to report contact—through role-based communication.

- **Record of Correspondence**: Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging**: Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture**: Does not let you capture emails from an external email system.
- **Contact Synchronization**: Does not synchronize contacts with Outlook.

Grant Requirements & Outcomes Evaluation

- **Defining Grant Requirements**: Lets you define a default set of grant requirements across all RFPs or by specific program, and customize them for individual grantees.
- **Branching for Evaluation**: Data collection can "branch" based on the type of grant.
- **Grant Requirement Deadlines**: Grantees can view grant requirement deadlines online.
- **Viewing Grant Requirements**: From the grant application you can see which requirements have been met.
- **Tracking Individual Grantee Outcomes**: The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. Foundation staff can view both outcome goals and actuals on the same screen.
- **Online Progress Report Submission**: Lets grantees submit progress report information through online data fields on the grantee portal, which you can then summarize across grantees in reports.
- **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.
- **Creating Online Progress Report Forms**: Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. You can create a custom application for each RFP.
- **Supporting Data Collection for User Groups**: The system does not support user groups to collect uniform data, but reporting questions can be standardized across each RFP, and progress report fields are required.
- **Overall Approach to Outcomes Reporting**: Lets foundation staff define outcome goals by program and for individual grants and automatically calculates progress towards those goals using submitted progress reports. This is achieved using custom fields on application forms to collect initial goals and the system reporting functionality.

Payments

- **Default Payment Scheduling**: Does not let you define a default payment schedule.
- **Viewing Payment Schedules**: Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests**: It's possible to generate a paper check request for accounting by running and exporting a report.
- **View Scheduled Payment Amount (Annual)**: Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing**: Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support**: Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments**: Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made**: Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration**: Does not currently integrate with any accounting software packages.
- **Automated Payment Approval Process**: Does not support an automated payment approval process.

- **Multi-Currency Support**: Only supports grants in a single currency per RFP, but each giving program can be configured to use a different 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.
- **Scheduling Repayments for Program-Related Investments (PRIs)**: The system allows users to manually define a repayment schedule for Program-Related Investments.
- **Payment Notes**: The system provides the ability to include notes on payments.
- **Payment Reporting**: Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Viewing Payment Schedule Online**: Grantees cannot view the payment schedule for their award(s) online through the grantee portal.
- **Other Payment Issues**: Voided payments could be recorded in the system as "declined"; the system has the ability to track quid pro quo and in-kind payments.

Budgeting

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

System Querying and Reporting

- **General Reporting Approach**: The process of running reports is easy enough for casual users to run queries independently.
- **Searching and Filtering**: Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification**: Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Favorite Reports, Queries, and Actions**: Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports**: Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting**: Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users, but cannot include logos or headers without exporting to Excel.
- **Grant Summary Tracking**: Can track summaries based on hierarchical codes—for example, to show grant money paid to each education sub-program as well as total education grants.
- **Data Reportability**: Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.

- **Report Drill-Down**: Does not let you drill down on reports.
- **Attachment Searching**: You can search the filename or custom description of attached documents, but not within the contents.
- **Automating Reports**: Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports**: There is no ability to create, view, and export data in a visual graphic representation (e.g., charts or graphs).
- **User Dashboards**: The system provides a dashboard view that summarizes the grants currently relevant to individual users. Users cannot create multiple unique dashboards.
- **Industry-Standard Reporting Templates**: Contains report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format.

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 six roles: admin, senior admin, reviewer, committee chair, applicant, and collaborator.
- **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—admin, senior admin, reviewer, and applicant—to provide a simpler experience for users with less-complex needs.
- **Audit Logging**: Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards**: The system provides a dashboard view that summarizes the grants currently relevant to each individual user. Users cannot create multiple unique dashboards.
- **Users Task Lists**: Provides users a "task list" when they sign onto the system.
- **Task Assignment**: You can assign tasks, such as reviews, to other users.
- **Board/Management View**: Provides a standard, focused, roles-based view for management and board members.
- **Role-Based Task Assignment**: Assigns tasks to users based on roles, but not by rules.

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 reports that an integration with PeopleSoft is in the product roadmap, and can build integrations with third-party accounting systems by request, at additional cost.
- **Reviewing Applications from a Mobile Device**: Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device**: Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity and Security**: The vendor provides robust documentation regarding its security, which highlights the redundancy of the data stored on its servers.

Overall Customization

- **Dropdown Fields**: Radio buttons are used in lieu of dropdown fields. These values are customizable.
- **Internal Tracking Fields**: Lets you add custom "internal tracking" fields for staff use.

- **Custom Fields**: The system lets you create a limited number of custom fields with the same permissions as system-standard fields. Almost all field names can be customized, except for those in the Applicant summary. The system keeps a log of when fields are created or changed for historical documentation.
- **Online Information Customization**: Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization**: Vendor will extensively customize system to your needs, possibly at additional cost.
- **System Extendibility** : Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems**: Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages**: The system relies on the browser's built-in translation functionality to translate applications or the admin interface.
- **Customization by Foundation Staff**: Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

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 is geared to the needs of novice users—as such, an expert user will need to take more steps and clicks to take action than in some other systems.

Support and Training

- **Phone Support**: Vendor provides unlimited phone support without additional cost, during business hours.
- **Online Support**: Vendor provides unlimited email or online support without additional cost.
- **Manuals and Documentation**: The vendor provides manuals and documentation, including slide shows, videos, and tip sheets.
- **Training**: The vendor provides initial training via the Internet at no additional cost and additional training sessions can be scheduled. In-person training can be scheduled for a nominal fee.
- **User Support Forums**: There are user support forums or discussion groups available.
- **Installation and Maintenance**:
- **Installation and Maintenance**: This online hosted system is accessible from any major web browser.

Vendor Background

- **History**: The vendor has been in business since 2002; ZoomGrants has been in use since 2002.
- **Client Base**: The vendor reports that it has about 75 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.

Customer Experience Survey

- **Number of Survey Respondants Who Reported Using the System**: 0
- **Percent of Survey Respondants who Would Recommend the system**: N/A
- **Training Score**: N/A
- **Implementation Score**: N/A
- **Support Score**: N/A

APPENDICES

APPENDIX A: RESEARCH METHODOLOGY

Eligibility Criteria

The constituency for grants management systems can be divided into two broad groups: software for private foundations (including corporate and family foundations) and software for community foundations. While this report focuses primarily on grants management software for private foundations, we have included two packages that are either widely-used by community foundations, or primarily at that audience.

Further, we decided our definition of a grants management system would include only systems capable of managing the full grant cycle, and which are offered as free standing products rather than part of a foundation "back office" management service. Systems on our list that we knew met these criteria were included on our final roster, and we emailed an eligibility questionnaire to vendors of systems less known to us to determine whether their software fit our grants management system definition. We also disseminated widely a call for participation through the lists of the Technology Affinity Group (TAG) and Grants Managers Network (GMN). Through this process, we rounded out our final roster of 29 systems to review.

Product Selection

We started with a list of grants management systems that included products known to Idealware, the Technology Affinity Group, and Grants Managers Network .

From this list, we invited both vendors who participated in our 2013 report and vendors of products that we knew met our selection criteria to demo their grants management solution for our 2016 report. We then emailed an eligibility questionnaire to vendors of products we were not familiar with.

Based on responses to our questionnaire, we added four new systems which had not been reviewed in previous versions of the report. Three products included in previous versions of the report were not included in the update process: GrantStream's GrantRight (now Grants by Benevity), because the vendor did not respond to our requests for a demonstration within the research period, and MicroEdge GIFTS and GIFTS Alta, as the vendor is no longer actively taking new clients for those systems. This left us with 29 grants management systems to review.

Evaluation Criteria

We started with the criteria used for our 2013 grants management report, then solicited feedback on our criteria from three experts in the grants management field. In October 2013, we distributed our evaluation criteria to the vendors included in the 2013 version of the report with a call for comment and revision. In addition, Idealware met with representatives from the vendors included in the 2013 report for a roundtable discussion in November 2015 for additional feedback on the review criteria and overall structure of the report.

That process, paired with our expert interviews, resulted in the addition of 11 new and revised criteria to use when evaluating the 29 grants management systems in this updated edition of our report. Our features comparison is based on a rubric derived from these evaluation criteria. This rubric is, in turn, based on the one we used in the earlier editions of this report, with some changes that reflect both the addition of the new criteria and the current state of the field of grants management systems.

From late December 2015 through March 2016, Idealware conducted detailed software demos of 29 grants management packages. These packages were evaluated against 174 criteria for reviews. The results can be found in the previous section.

Customer Experience Survey

In February 2016, Idealware distributed a customer experience survey through the lists of the GMN and TAG community, as well as directly to the vendors of the grants management systems included in this review. We had 779 people take the survey. For each review, we've published how many people reported using the grants management software in the survey, and a score based on their reported experience with the training, support, and implementation offered by the systems' vendors. For many systems, the sample size was very small, and this survey should not be taken as a rigorously scientific research method. It's our hope that the survey represents a facet of the grants management landscape that is different from the function-based write-ups in this guide.

APPENDIX B: HOW WE EVALUATED THE SYSTEMS

The reviews are much easier to understand when the vast amount of information gathered is considered through the lens of typical grantmaker needs. In order to more easily compare strengths and weakness across packages, we created a rating system based on the common needs expressed in interviews and the features on which packages typically differed. While every organization will need to decide on the criteria that is important for their own needs, and thus may rate criteria quite differently than we did, this rating system can provide a starting point for comparison.

Internal Tracking

None / Not Acceptable	Basic	Solid	Advanced
• 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 proposal 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. • Lets you easily view related records and data across records.	Meets **Solid** criteria, plus: • Lets you easily attach external documents to a grant record, without logging into a separate interface as a grantee. • Lets you define custom categorization codes for tracking and reporting. • Lets you easily update basic grant information like project names or codes throughout the process. • Lets you easily enter applications received in paper into the system without logging into a separate interface as an applicant. • Lets you perform batch updates of defined coding and other fields. • The system stores attached documents in the database as objects rather than links. OR, the system uploads attached documents to the server and stores a link to that uploaded file in the database. • Can track by percentage or dollar allocation across programs.

Online Applications—Grantmaker Experience

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you collect application information online and view it. • Can include custom dropdowns and text fields in applications. • Lets applicants upload files as part of their application.	Meets **Basic** criteria, plus: • Can include file uploads, dropdowns, checkboxes, and text fields in application fields. • Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, and/or a more detailed proposal stage. • Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required. • Supports multiple logins for grantees on a single application. OR, grant application forms can branch at all stages, possibly through customization. • There is a virus scan or security feature to prevent malicious files from being uploaded onto the application or downloaded onto the system.	Meets **Solid** criteria, plus: • Lets you create new online applications without additional charges from vendor. • Lets you customize a confirmation message to be sent upon submission of an application. • Lets applicants upload a wide variety of files as part of their application. • The system allows both individual applicants and organizations to apply for grants from the same grant program. • Supports multiple logins for grantees on a single application, AND grant application forms can branch at all stages, possibly through customization. • Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, a more detailed proposal stage, and as many other stages as needed.

Online Applications—Grantseeker Experience

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	EITHER: • Lets applicants view their status online. • System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. OR: • Grantee portal views are responsively designed to be compatible with mobile browsers.	Meets **Basic** criteria, plus: • Lets applicants save their application and return to it at a later point. • Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal. • Applicants can easily view or print applications at any stage in the process.	Meets **Solid** criteria, plus: • Both applicant and grantmaker can quickly and easily reset lost credentials. • The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them. • The system checks the email address of each new registrant to make sure it doesn't already exist in the system, and prompts the user if it is a duplicate. • Eligibility quizzes can branch to multiple applications. • Grant seekers can automatically fill in their organization profile by entering their EIN number or from a previously-submitted application. OR, Applicants can collaborate with a reviewer on a proposal to address comments or suggestions within the system itself, prior to submitting the final application.

Form Design & Flexibility

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you, or the vendor, customize online application forms with your logo, at a minimum. • Lets you adjust character or word counts for at least some fields in online forms.	Meets **Basic** criteria, plus: • Lets you adjust character or word counts for all fields in online forms. • Lets you adjust character count, and displays prominently how many characters remain on a field. • Lets you customize in-system help for applicants or grantees. OR The vendor provides technical support for applicants.	Meets **Solid** criteria, plus: • Lets you, or the vendor, customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, at no additional cost. • Lets you adjust word as well as character count, and displays prominently how many words or characters remain on a field. • In-system help is customizable (by you or by the vendor) in the form of online videos, FAQs, wikis, or another sophisticated option.

Application Review

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Supports at least a single review comment and rating for each application. • Lets reviewers easily print grant summaries.	Meets **Basic** criteria, plus: • Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for or been given in the past. • External or internal reviewers can print grant summaries or full grant information (including attachments). Lets multiple reviewers each rate an application, with at least one comment and one numeric grade for each application. • Provides a simplified "portal" interface to allow reviewers to see and review grant applications without navigating the full grants management interface. • Proposal owner and management staff can be automatically notified when reviews are completed, either via email or within the system. • Supports checklist functionality to define what information or documents you require from prospective grantees. OR, provides strong online application functionality, including the ability to reopen online applications once they've been submitted if more information is required from the applicant.	Meets **Solid** criteria, plus: • Lets multiple reviewers each numerically rate an application on a number of different factors, and add comments. • Supports different information or scoring schemes for different programs. • Supports online viewing and reviewing of applications. • Lets you track external reviewers' interests, potential conflicts of interest, and geographic location or area of expertise and use those criteria to assign applications for review. • Lets reviewers see each other's comments and grades, if you allow it. • Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them. • Lets you define automatic steps and rules, or "workflow," for the grants review process. • Supports checklist func¬tionality to define what information or documents you require from prospec¬tive grantees.

501(c)(3) and OFAC Status

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you click on organizations to view their record and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar.	Meets **Basic** criteria, plus: • Lets you create a list of organizations in a format that can easily be used to check them against standard OFAC and other terrorist watch lists, potentially in a different system. • The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status.	Meets **Solid** criteria, plus: • Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed. • Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. • Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s). • Lets you perform checks and updates in batch. OR, the vendor will perform checks and updates in batch for you.

Letters & Board Dockets

None / Not Acceptable	Basic	Solid	Advanced
While letters and dockets are quite different from a process perspective, they are technically very similar, and most systems have a similar level of support for each.			
• Does not meet the criteria for **Basic**.	• Lets you print a view of each grant application. • Lets you insert mail-merge data into letters, possibly by way of downloading data into Microsoft Excel.	Meets **Basic** criteria, plus: • Lets you define a default format for grant application summaries and choose which fields to include. • Provides several standard letter and electronic templates that you can generate using grant record information.	Meets **Solid** criteria, plus: • Lets you define a default format for printing grant application summaries, choosing which fields to include, as well as customizing fonts, colors, and logos. • Lets you create letter templates that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos. • Lets you print letters or summaries either individually or for a series of grants or grant applications in a single step. • Lets you view and customize individual letters before printing them. • The system provides support for electronic signatures, possibly with external verification.

Emails

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you send email through the system to a single individual, but not to a particular group of people at once. OR, Lets you easily send an email to a particular a group of people at once, but not to individuals.	Meets **Basic** criteria, plus: • Lets you send email through the system to a single individual or a group of people who meet particular criteria. Group emails are not sent as blind copies, but rather as one-to-one. • Lets you set up and send automatic emails based on certain events. OR, Lets you set up and send scheduled reminders to applicants and grantees.	Meets **Solid** criteria, plus: • Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data. • Lets you set up and send scheduled reminders to applicants and grantees • Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports. • Lets you attach files to emails sent to individuals and groups.

Relationship Management

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization. • Lets you note interactions with a grantee with at least a single comment field.	Meets **Basic** criteria, plus: • Lets you associate multiple contacts with an organization, and define their relationships to you and to a specific grant. • Lets you keep a log of communications such as phone calls and emails with a particular contact or a grantee organization. • Lets you keep former staffers that were associated with a grant on an organization's record without making them active contacts for communications. • Can track individual business units under a larger organization. OR, Lets you automatically capture emails from external email systems into grantee or organization records.	Meets **Solid** criteria, plus: • Automatically stores a record of all system-generated letters and emails for each grant. • Lets you keep a log of communications such as phone calls and emails with a particular contact at a grantee organization. • Can track individual business units under a larger organization. • Lets you communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact). • System allows you to automatically synchronize contacts with Outlook. OR, System allows you to automatically export system contacts to Outlook or Exchange. OR, System lets you automatically capture emails from external email systems into grantee or organization records.

Grant Requirements & Outcomes Evaluation

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you easily see which requirements grantees have met, and which they have not. • Can automatically email grantees to remind them about upcoming deadlines. OR, Lets grantees submit progress report information through online data fields. OR: • The system provides a dedicated functionality for evaluating and reporting on outcomes across all grantees in the system.	Meets **Basic** criteria, plus: • Lets you define a default set of grant requirements for all grant opportunities. • Lets you store progress report information submit¬ted by grantees in multiple data fields. • Can automatically email grantees to remind them about upcoming deadlines. • Lets grantees submit progress report information through online data fields. • Lets grantees view grant requirement deadlines online, possibly through customization. • Foundation staff can view both original outcome goals and grantee responses from submitted progress reports on the same screen. OR, The system can support evaluating and reporting on grantee outcomes through custom reports, possibly with customization. • The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports.	Meets **Solid** criteria, plus: • Lets you define a default set of grant requirements, by grant opportunity or program, and customize them for individual grantees. OR, Emails to applicants can include information spe¬cific to the grant program in question. • Lets grantees submit progress report information through online data fields, which you can then summarize across grantees in reports. • Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees. • Supports evaluation metrics based on user groups—i.e., you can summarize and report on data based on grantee's programs, geographic location, or other criteria. • Data collection can branch based on type of grant. • The system provides a dedicated functionality for evaluating and reporting on outcomes across all grantees in the system.

Payments			
None / Not Acceptable	**Basic**	**Solid**	**Advanced**
• Does not meet the criteria for **Basic**.	• Lets you define a payment schedule for each grant. • Lets you see what scheduled payments are upcoming. • Lets you see what payments have been made, including amount, date paid, and check number.	Meets **Basic** criteria, plus: • Can generate a report of the amount scheduled to be paid out in a given year (including carryover from previous years' grants). • Lets you see upcoming scheduled payments and whether the grantee has met requirements linked with that payment. • Supports payments to organizations other than the primary grantee (for example, fiscal sponsors). • Lets you include a note on a payment. • Supports grants in a single currency. OR, Allows for payments to be made contingent or conditional upon a specified grant or payment requirement. • Lets you pull reports on payments which carry coding attributes of associated requests, organizations, and contacts. • Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule can display either paid or upcoming payments, but not both. OR, The system allows users to manually define a repayment schedule for PRIs.	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. • Lets you include a note on a payment. • Supports wire transfers by storing required information and confirmation codes for successful transactions. • Supports grants made in multiple currencies by storing currency and exchange rate information. • Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually. • Allows for payments to be made contingent or conditional upon a specified grant or payment requirement. • Lets you configure audit or security controls to ensure that only certain staff can change payment information. • Supports an automated payment approval process with configurable workflow steps. • Lets you void payments, make refunds, and place payments on hold, which are attached to workflows within the system. • There is the ability to update payment details and create payments (e.g., general ledger account, fund, etc.) in batch. OR, There is the ability to track quid pro quo and in kind payments. • Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments, OR The system can automatically generate a repayment schedule for PRIs.

Budgeting

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you track either the amount awarded or the amount budgeted in a particular year.	Meets **Basic** criteria, plus: • Can split grants across more than one program for budgeting purposes. OR, Lets you use previous years' budgets as a base and adjust them for current year.	Meets **Solid** criteria, plus: • Lets you choose whether to track either the amount awarded or the amount budgeted in a particular year. • Can track budgets in hierarchically defined categories or program areas. • Lets administrators view the impact a particular grant will have on future year payouts with a "what if" type feature. OR, Lets you track interest repayments on PRIs (possibly through customization). • Can split grants across more than one program for budgeting purposes.

System Querying and Reporting

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you run pre-packaged basic reports, such as a standard 990 report, upcoming payments, or the list of grants currently being reviewed.	Meets **Basic** criteria, plus: • Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants. • Lets you save reports that you create or modify. • Supports ad hoc reports, which can include nearly any field displayed to users, possibly by exporting data to Excel for formatting. • Virtually all system data—including the data entered into online applications, review forms, and grantee progress reports, if supported—can be included in reports. • Lets you quickly view favorite reports without navigating a much-larger set. OR, can make small updates to standard reports. • There is a process of running reports that is easy enough for casual users to run queries independently.	Meets **Solid** criteria, plus: • Supports ad hoc reports within the system, which can include custom data columns, datasets, sorting, grouping, logos, and headers. • Can make small updates to standard reports. • Reports can be set to automatically run and sent to individuals or groups. • Users can create their own multiple unique dashboards, or a vendor can do this for you. • Lets you quickly view favorite reports, and possibly queries and actions, without navigating a much-larger set. • Lets you save ad hoc reports that you create or modify. • Lets you search the con¬tents of file attachments. • Lets you drill down for more information on some or all reports. • Lets you create, view, and export data in a visual graphic representation such as charts and graphs.

Permissions & Workflow

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you grant individuals access (or not) to certain large areas of system information, such as a module.	Meets **Basic** criteria, plus: • Has at least two different internal interfaces—for example, an admin view and a reviewer view—to provide a simpler experience for users with less complex needs. • Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log. • Lets you grant individuals granular access to view, edit, or delete data for a wide variety of system functions.	Meets **Solid** criteria, plus: • Lets you define user or group permissions on a field-by-field basis. • Provides "dashboard" views, which summarize the grants and tasks currently relevant to each individual user. • Lets you assign tasks, such as the review of a progress report, to particular users through workflow functionality. • Provides a standard, focused, roles-based view for management and board members. OR, Assigns tasks to users based on rules and roles.

Data Access

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• All data stored within the database can be extracted by someone other than the vendor. OR, The vendor agrees to provide data in a standard file format (such as .csv) as part of the standard license agreement. • Lets you export core grant data, such as project name, program, and grant amount, into another file format, such as .xls or .csv, in a way that it can be used for further reporting.	Meets **Basic** criteria, plus: • Lets you export most data visible to users into another file format, such as .xls or .csv, in a way that it can be used for further reporting. • Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system. OR, Provides apps or views designed specifically for mobile devices (for any purpose).	Meets **Solid** criteria, plus: • Lets you export all data visible to users into another file format, such as .xls or .csv. • Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system.

Overall Customization

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Lets you customize the information requested in online applications, if offered, potentially at additional cost. • Lets you store custom information submitted by grantees, such as application narratives or progress report metrics, in separate fields. • Lets you customize dropdown values for fields such as program or grant codes.	Meets **Basic** criteria, plus: • Lets you customize the information requested in online applications and review forms at no additional cost. OR, vendor will extensively customize system to your needs, potentially at additional cost.	Meets **Solid** criteria, plus: • Lets you add custom "internal tracking" fields for staff use, potentially at additional cost. • Lets you customize the names of fields displayed in the interface, potentially at additional cost. • Lets you add a virtually unlimited amount of custom fields, with an audit log to track their creation. • Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).

Ease of Use

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Most individuals could learn how to use the system with training.	• Users can easily find the actions they are most likely to take (possibly by looking through a considerable list of options). • The interface is polished looking (though potentially otherwise flawed).	Meets **Solid** criteria, plus: • The interface is polished looking and neatly laid out. • Navigation and action items are labeled intuitively. • Users can easily find the actions they are most likely to take. • The system pulls together the information and actions an expert user is likely to need.

Support & Training

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• Vendor can be reached for questions. • Vendor provides either online or printed help manuals.	Meets **Basic** criteria, plus: • Vendor provides training, potentially at additional cost. • Vendor provides phone support.	Meets **Solid** criteria, plus: • Vendor provides unlimited phone and email support within a yearly fee or maintenance package. • Vendor provides initial training in person or via the Internet at no additional cost, and additional training sessions can be scheduled.

Customer Experience with Support

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was below 1 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was within 1 point of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was above 1 point of our average score.

Customer Experience with Training

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was below .25 points of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was within .25 points of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding support was above .25 points of our average score.

Customer Experience with Implementation

None / Not Acceptable	Basic	Solid	Advanced
• The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was below .25 points of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was within .25 points of our average score.	• Number of respondents who agreed or strongly agreed with positive statements regarding implementation was above .25 points of our average score.

Stability in the Market

None / Not Acceptable	Basic	Solid	Advanced
• Does not meet the criteria for **Basic**.	• The software package has been in use by clients for more than one year. OR, The vendor reports that the software package has more than 10 clients.	Meets **Basic** criteria, plus: • The software package has been in use by clients for more than three years while supported by the same vendor. OR, The vendor reports that the software package has more than 20 clients. • The revenue earned from the software package covers the personnel and operational expenses required to support it.	Meets **Solid** criteria, plus: • The software package has been in use by clients for more than three years. • The vendor reports that the software package has 50 clients or more.

APPENDIX C: CUSTOMER EXPERIENCE SURVEY

Grants Management Consumer Experience Survey - 2016

1. What system do you use to manage your grantmaking process?

Other (please specify)

2. About how long have you had the system you currently use?

3. Would you recommend this system to another grantmaker?

4. Does your vendor offer multiple tiers of support (Basic, Premium, etc.)?

5. If so, did you elect to purchase the premium support level?

6. Do you agree or disagree with the following statements regarding*support* for the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I've never contacted this vendor	I don't recall
It's generally easy to reach someone with a particular problem or questions.						
In general, the people I've reached were able to solve my problem/answer my question.						
In general, my questions or issues are resolved within an hour or two.						
In general, my questions or issues are resolved within 24 hours.						
The vendor provides useful online avenues in which to research an issue or solution myself.						
The vendor is consistently available and prompt in terms of responding to a question or other need.						
I generally hear from the vendor about pending updates to the system.						
In general, it is clear to me what is in an update.						
In general, updates to the system are relevant to our needs.						

7. Do you agree or disagree with the following statements regrading the *implementation* of the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in implementing the software
The implementation of the software went according to schedule.						
The implementation of the software went according to budget.						
The representatives of the vendor during the implementation phase were knowledgeable.						
The system delivers on the promises the vendor made during the sales process.						
Small issues from implementation were resolved within a few days.						
Larger issues from implementation were resolved within 1-2 weeks.						

8. Do you agree or disagree with the following statements regarding the *training offered by the vendor*?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in training on the software
The training offered by the vendor covers areas of interest to me and my organization.						
The training offered by the vendor is generally helpful.						
The training offered by the vendor is generally easy to understand.						
The training offered by the vendor is generally easily accessible.						
In general, the quality of training offered by the vendor is worth what we pay for it.						

9. If using a hosted/online solution, about how often has there been a time when you couldn't access the system?

APPENDIX D: ABOUT THIS REPORT

Authors

Kyle Andrei, Senior Researcher

As Senior Researcher, Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware's reports and articles. In addition, Kyle also draws on his broadcast experience to produce Idealware's Ask Idealware videos. Outside of Idealware, Kyle volunteers with the Maine League of Young Voters as chair of the Civic Guide Committee, providing nonpartisan guides to the civic process in Portland. Kyle is a graduate of Indiana State University, where he studied broadcasting, managed the student radio station, and volunteered on local election campaigns.

Chris Bernard, Research and Editorial Director

Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Prior to Idealware, he was managing editor of a newspaper and a senior copywriter at an ad agency. Since 2007 he has overseen Idealware's editorial and communications efforts, driving the creation and publication of more than a hundred articles, reports, and other resources and managing the communications calendar. Outside of his work at Idealware, he's an award-winning author and a frequent speaker and lecturer at literary conferences and festivals around the country.

Amadie Hart, Researcher

Amadie Hart is a contract writer and researcher for Idealware and President of Hart Strategic Marketing LLC. Amadie founded the company in February 2012 to provide smart marketing and communications consulting to nonprofits and small businesses. She helps clients develop strategic online marketing plans, create and implement online communications strategies, redevelop website content, make decisions about content management and customer relationship software, and integrate social media into outreach efforts.

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About The Report Partners

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.

Grants Managers Network

Grants Managers Network's mission is to improve grantmaking by advancing the knowledge, skills, and abilities of grants management professionals and by leading grantmakers to adopt and incorporate effective practices that benefit the philanthropic community. Grants Managers Network is a leader in identifying and promoting effective grantmaking practices through field-wide change efforts. Learn more at www.gmnetwork.org.

Technology Affinity Group

The Technology Affinity Group (TAG) is a nonprofit membership organization that promotes the power of technology to advance the goals of the philanthropic sector. TAG is an active community of professionals responsible for aligning technology with the philanthropic objectives of their organizations, striving to provide the highest quality resources and learning opportunities for TAG members in an open environment built on trust and a shared belief in the greater common good.

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Idealware was responsible for all of the research and editorial content of this report, which was created without the review of those who funded it. The vendors of systems included in this report do not pay for inclusion, nor does Idealware accept any funding from vendors at any time. Neither the funder nor the vendors had any input over the editorial content of this report. Funding for this report came from the Technology Affinity Group (TAG) and Grants Managers Network.

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