A CONSUMERS GUIDE TO GRANTS MANAGEMENT SYSTEMS

MARCH 2020

TECHIMPACT® IDEALWARE℠

grantbook°

PEAK Grantmaking

FOREWORD

Dear Reader,

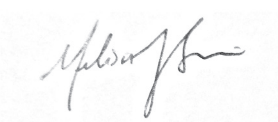
Welcome to the 2020 edition of the *Consumers Guide to Grants Management Systems*!

In the four years since the last edition, the marketplace for grants management systems has undergone a *lot* of changes. This time around, we're reviewing fewer systems (acquisitions!) but many of them have increased functionality and have improved overall to respond to the many stakeholders, both inside and outside of a grantmaking institution, who interact with these online systems.

Increasingly, grantmakers want good data to measure impact, to make more strategic decisions, and to support learning for the philanthropic and nonprofit sector as a whole. These strategic imperatives have pushed many of these systems—and the people who use them—far beyond basic administrative functions.

Most exciting this year is our introduction of an interactive digital version that enables you to explore by requirements, price, and more.

We hope this guide provides an invaluable resource as you weigh your options.



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HOW WAS THIS REPORT FUNDED?

This Tech Impact Idealware report is the product of a partnership with Grantbook and PEAK Grantmaking, who funded the work.

Maintaining editorial integrity and impartiality while funding reports in the technology sector demands rigor. Idealware works hard to meet those demands as well as the expectations of our audience. To maintain editorial integrity and impartiality, we take the following steps:

- Idealware is responsible for the research and editorial content of this report.
- Our funding partners contributed subject matter expertise to help inform the work, including gating criteria for system inclusion, requirements criteria, and marketplace trends, but were not involved in the system demos or reviews.
- Vendors of systems included in this report or any of our reports do not pay for inclusion.
- Vendors have no input over the editorial content of this report and do not see the report prior to publication.

Additionally, Candid, TAG, and The Chronicle of Philanthropy served as promotional partners. They've agreed to help us distribute the report to widen our reach in exchange for promotional considerations. None of the promotional partners contributed funding or had any input into or oversight of the content of the report.

HOW TO SHARE THIS REPORT ▶▶▶

It's our goal to reach as wide an audience as possible with this resource, and we encourage readers and vendors to share it with as many people as they wish. Rather than sharing a PDF or printed version, we ask that you share a link to the guide on our website.

While we make our resources free to our audience, requiring registration to access them allows us to both notify readers of updates, corrections, and other relevant changes and to make the case to funders that our work is valuable by demonstrating our reach.

To share this work, please use the following link: http://www.idealware.org/reports/gms2020.

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INTRODUCTION ▶▶▶

Change is constant, and the grants management system marketplace is no exception.

First, just to clarify, in this guide we're talking about systems used by foundations and other grantmakers to track grants over their entire lifecycle; we're not talking about systems for individuals or organizations to track their applications and submissions for grants.

Managing a grantmaking program is hard. Every grant means a universe of administrative details that need to be planned, scheduled, carried out, monitored, and reported on. On top of that are tasks that relate each individual grant into a foundation's program and activities that ensure that all of a foundation's programs fit into a strategic framework.

Grants management systems were initially developed to solve that primary level of grantmaking challenges by providing a place to house and manage the details that comprise the grant lifecycle. As technology changed to facilitate communication and collaboration, so did grants management systems.

At the same time, the philanthropic sector became more introspective, undertaking efforts to define strategic and effective philanthropy and adopt data-driven decision-making processes. The pressure to collect more data on grants and grantees in formats that facilitate analysis and reporting once again expanded the role of grants management systems to accommodate the increasing prevalence of online applications and progress reports and explore different approaches to outcomes measurement and reporting.

Today, grants management systems play a more prominent role in a foundation's technology ecosystem. They have expanded from tools used primarily by grant managers to include applicant and grantee portals, online review portals, program management functions, dashboards and reports configured to meet the needs of foundation leadership, and even some board portal functionality.

Change is constant, and the grants management system marketplace is no exception.

This means that more individuals representing a wide range of technological comfort are using these systems; as a result, they need to be more intuitive to casual users while retaining the ability for advanced users to easily accomplish tasks. And because these individuals are less likely to be working within a central office, the systems need to be accessible from many locations and across a wide variety of devices.

Since we first released *A Consumers Guide to Grants Management Systems* in 2008, we've worked to identify the factors driving this evolution in the marketplace and integrate the changing requirements into our evaluations. To that end, we developed this fifth edition of the guide in consultation with a distinguished collective of subject matter experts who provided insight into the changes in functionality that appear in today's systems as well as changes in the philanthropic sector that are transforming grantmaking itself.

We have also taken to heart feedback received from readers of past editions of the guide, and from the system vendors themselves, who invest significant time and effort into providing demos, answering follow-up questions, and responding to requests for clarification.

Changes Since the Last Edition

With this edition, we've introduced substantial changes to the Consumers Guide. The most significant is a redeveloped rubric that groups core system functionality into 12 areas and maps specific abilities into three levels: Basic, Standard, and Advanced.

We've also changed the structure of system evaluations. Because there are many commonalities among the systems for how they support core functions, we have moved away from bulleted lists describing the function of every element we evaluated and toward a more direct approach to summarizing key functions.

To reflect the changing role of grants management systems in foundations, we also revised our inclusion criteria to meet a series of "must have" features identified by the subject matter experts with whom we worked. Our new criteria, which is detailed on page 125, includes a focus on cloud-based systems that have a demonstrated base in the private and family foundation sector.

Changes in the marketplace have affected a number of systems included in previous editions, including the following:

- Altum, which acquired Easygrants and PhilanTrack, rebranded in 2019 and focused efforts on its ProposalCentral product, which now supports grantmaking in the research sector.
- Foundant acquired Smalldog.
- Cybergrants acquired EasyMatch.
- Blackbaud acquired MicroEdge's GIFTS Online platform.
- Benevity acquired Versaic, but decided to market both systems primarily to the corporate grantmaking sector.
- foundationConnect, a solution built on top of Salesforce that was originally developed by NPower and then acquired by roundCorner, was subsequently acquired by Salesforce.

Other systems have rebranded:

- FluidReview, acquired by SurveyMonkey in 2014, is now SurveyMonkey Apply.
- WESTAF's GrantsOnline™ is now called GO Smart™.

This continued movement in the marketplace, combined with more stringent inclusion criteria, means that this edition looks at a substantially smaller number of systems than in the past. But those that it does include have a stronger focus on the needs of private and family foundations and/or fill a market niche that might otherwise be under-served.

How to Use the Guide

This guide should serve as a reference to help you determine which grants management solutions might best fit your needs.

The State of the GMS Marketplace section takes a deeper dive into the foundation and grantmaking trends that have shifted the marketplace over the last five years and looks at how some software is evolving to meet new demands.

The *Selecting a Grants Management System* section 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 or transitioning from one system to another.

The *Comparing Grants Management Systems* section takes a closer look at the specific systems we reviewed. Each has its own strengths and trade-offs, and there is wide variety among them. We've grouped them into six categories based on what we saw as primary differentiators:

- Low-Cost Solutions for Smaller Foundations
- Systems with Features to Assist Non-Technical Users
- Systems that Simplify the Applicant Experience
- Systems with Strong Application Review Features
- Systems that Facilitate Outcomes Measurement and Evaluation
- Systems for Global Grantmakers

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. Our Comparison Charts, which start on page 35, map each system's functionality against our rubric and include general pricing estimates from the vendors so you can see at a glance which systems best meet your most critical needs.

Once you've identified a shortlist of systems you think might meet your foundation's needs, turn to *Reviews of the Grants Management Systems*. Each review begins with a summary of the system that highlights key differentiators in the marketplace, followed by general system costs, more detailed descriptions of the system's ability in each of the core functionality areas, and key metrics for the system from our customer experience survey.

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 those 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.

Accessing the Online Version

For the first time, this edition includes an interactive online version of this report with comparison charts that let you more easily sort, filter, and compare systems. Our hope is that this digital version will make it easier than ever to find the right system for your foundation's needs.

Find it at http://www.idealware.org/reports/gms2020.

We believe this guide continues to be a valuable resource to foundations seeking to make decisions about technology that can streamline and enhance their grantmaking. As always we welcome your input about what is helpful and where we can continue to improve.

THE STATE OF THE MARKETPLACE ▶▶▶

Since the last edition of this report in 2016, the GMS marketplace has undergone a period of transition—one driven by both a shift in how some foundations are approaching grantmaking and by the rapid pace of technological change.

The biggest change in technology has been the widespread adoption of cloud computing and its effect on everything from how companies and organizations manage their IT to the explosive growth in remote work. According to data from FlexJobs and Global Workplace Analytics, from 2012-2017 the number of people in the U.S. working remotely grew 44 percent.[1] Cloud-based systems facilitate remote work by allowing staff to log in and access the tools they need to do their jobs anywhere they have an internet connection.

Cloud-based tools that facilitate collaboration within teams, across organizations, and with external constituents and partners have seen particularly rapid adoption. This includes document storage and management tools (e.g. OneDrive, Dropbox, Google Docs), online messaging apps (e.g. Slack, Teams), and project management/collaboration tools (e.g. Asana, Trello, Teamwork PM).

As organizations adopt more tools for collaboration and communication, choosing those that integrate easily with others in the toolbox has become more important in order to avoid redundant data systems. This is often accomplished through APIs (Application Programming Interfaces), pieces of code included in software that allows other systems to read data from and sometimes deliver data to parts of the system.

In other words, it is becoming more common for organizations and businesses to use a variety of tools that can talk to each other to work more efficiently with colleagues, partners, and constituents from any location. Most vendors recognize these trends and are adapting their grants management systems to meet these new demands.

On the foundation side, there has been a growing emphasis on measuring grant outcomes in order to quantify impact and to evaluate that outcome data to improve programmatic decision making. More recently, some foundations are taking steps to address systemic inequalities in grantmaking programs and processes. Both of these efforts have ramifications for grants management systems.

Evaluation/Measuring Impact

In the 2016 Consumers Guide, we expanded our research around reporting requirements to include a question for vendors about how their systems might support impact measurement. Collecting and evaluating data related to impact has continued to grow in importance, and this is one of the areas in which the GMS marketplace has seen the most growth.

This is particularly important for foundations that are implementing Diversity, Equity, and Inclusion (DEI) goals and/or programs. DEI measurement requires the capture of demographic data at both the organization and grant level, as well as the ability to disaggregate data in order to be able to measure and report on impact along demographic categories.

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1 Remote Work Statistics for 2019: Shifting Norms and Expectations

Vendors and funders are working together to identify how to solve for representing the demographics of their grantee populations with fidelity and respect, while also determining how to standardize demographic categories that allow for roll-up analysis across funding portfolios, grantmaking organizations, regional areas, or mission areas.

The touchpoints for measuring and evaluating impact are the identification of impact metrics at the programmatic level within a foundation; the collection of anticipated outcomes related to those impact metrics from grant applicants; grantee reporting on progress toward outcome goals; and reporting that captures the aggregated outcomes data at the programmatic level, at the regional level, at the national level, or across mission areas.

Most grants management systems provide a great deal of flexibility to capture data by providing numerous custom fields that can be added to grant or organization records, which can then be included in ad hoc reports. A few systems have taken additional steps by building modules specifically focused on outcomes and evaluation. These include the ability to identify standard outcomes that can be integrated into applications and progress reports and programmatic dashboards that display progress toward goals.

This increased focus on data collection and outcomes evaluation is driving change in the role grants management systems play within foundations. These systems have evolved from tools focused on the mechanics of grants management to tools that provide the data used for strategic decision-making. That means that different aspects of the system need to be defined and maintained by staff across a foundation, and a broader range of staff (with varying levels of technical ability) needs to know how to use it effectively and incorporate it into their work.

> ***[Grants Management Systems] have evolved from tools focused on the mechanics of grants management to tools that provide the data used for strategic decision-making.***

Collaboration

Grants management systems have expanded to facilitate collaboration across internal teams, with external volunteers and partners, between funders and grantees, and even among grantees.

Within a foundation, a grants management system improves coordination between grants managers and the accounting team by facilitating the exchange of payment data and tracking payment commitments against budgets; between program managers and leadership by providing dashboards and reporting that monitors progress toward goals and program health; and among all staff who need information on foundation programs or grantees.

Many grants management systems facilitate interactions with—and among—grant reviewers by providing online portals where they can manage grant reviews, see the history of grants to an applicant, and see other reviewer comments and scores (if allowed by the foundation). A few grants management systems provide board portal access so that a foundation can provide online access to board dockets and documents.

A grants management system can also facilitate funder-grantee collaboration that is critical to grantee inclusion efforts and participatory grantmaking.[2]

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2 *Deciding Together: Shifting Power and Resources Through Participatory Grantmaking*

This includes the ability for funders and grantees to collaborate on applications with two-way communication and streamline application processes and reporting to be more inclusive of organizations that do not have the resources or capacity to navigate lengthy or complex online forms.

Online application processes are often yet another obstacle to funding for organizations led by and representing marginalized communities. In addition to workflow adjustments and efforts to "right-size" applications, systems can help reduce the administrative burden by allowing grantseekers to auto-populate organization data from previous applications or online 501(c)(3) databases; to import responses to similar questions from previous applications; to provide e-signatures rather than signing documents by hand; and to upload budget spreadsheets instead of cutting and pasting budget data into an online application.

A number of grants management systems also have the ability to facilitate partnership applications in which two different nonprofits collaborate on a funding opportunity. In some cases it is as simple as an applicant sending an email invitation in the system to invite an individual at another organization to collaborate, giving them both access to the application.

Software Integrations

Rather than trying to build an enterprise system that is expected to meet the needs of all areas of a foundation, many grants management systems are using integrations to take advantage of the strengths of other systems and avoid the creation of data silos. Many vendors offer multiple pre-built integrations to popular web-based tools, as well as the ability to custom-build additional integrations to extend system functionality.

Some of these integrations include the following:

- **Email Software**—to enable the capture and retention of electronic communications on grant, contact, and organization records without requiring staff to use the grants management system for all correspondence.
- **Accounting Systems**—to manage the flow of payment information and budget tracking.
- **Document Storage and Management Solutions**—to provide more direct access to grantee-uploaded materials.
- **Customer Relationship Management (CRM) Software**—to maintain a holistic record of all interactions with contacts.
- **Business Intelligence/Data Visualization Tools**—for deeper analysis and better reporting of data and outcomes.

Cybersecurity and Data Protection

Recent high-profile data breaches have increased awareness of the need for strong measures to protect organization data sources. Grants management systems—some of which store information about bank accounts, financial transactions, data on vulnerable populations, and sensitive organization data—can be tempting targets for hackers.

Vendors are responding with login security measures, such as system-enforced password complexity requirements, the ability to enable two-factor authentication, and end-to-end encryption of data. Other methods of protection include granular user permissions that allow an administrator to restrict the ability of users to view and/or change transaction data. Audit logs allow administrators to see what changes have been made to system records and who has made those changes. Finally, it is important to train staff to recognize and report phishing attempts.

Risk Identification and Management

One of the most recent movements in the grants management system marketplace is the development of modules that can help organizations identify potential risks, monitor risk, plan for unexpected risks, and take steps to address risks. In the corporate world, risk management generally refers to legal and financial compliance. However, in the world of philanthropy, organizations such as the Open Road Alliance are working to educate foundations and nonprofits about the concept of impact risk management (find the *Open Road Alliance Risk Management Toolkit* at openroadalliance.org/resource/toolkit/).

Impact risk management is tied to impact measurement and evaluation. By not identifying and addressing risks related to the delivery of program services, foundations can find themselves in situations where the impact they hoped to achieve with a specific grant is not realized. Examples of these risks include the likelihood of an adverse climate event or global pandemic that causes a disruption in service delivery; the departure of a key staff member; or the loss of a supplementary funding stream.

Foundations taking this approach to risk management are still early adopters, according to Open Road Alliance Executive Director Maya Winkelstein, but the momentum is growing. Open Road Alliance has worked with one grants management system vendor included in this report, Amp Impact, to develop a risk register module that helps identify, categorize, monitor, and address potential risks to impact, while CC Grant Tracker and Fluxx have other forms of risk register.

SELECTING A GRANTS MANAGEMENT SYSTEM

What Does a Grants Management System 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.

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.

Keep in mind that, during implementation, vendors can both configure (adjust settings for existing features) and customize (change or build new features) systems to meet your needs. A few systems can be almost completely tailored 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 processes, revisit the processes to see if they can be streamlined or improved. If you choose to have a vendor customize the system, make sure that vendor is experienced with this type of work and allows heavily customized systems to remain on the upgrade path.

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.

> ***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.***

Grant, Contact, and Organization Records

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).
- Track the proposal's status as it moves through your process.

Every system included in this guide handles these basic functions, but with varying degrees of ease and flexibility.

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.

The ability to categorize grant proposals 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 split grants across multiple categories and track allocations by percentage or actual dollar amount?

Grants management systems differ greatly in the way they handle taxonomies for categorization. Some have built-in taxonomies developed specifically for philanthropy that you may be able to expand, such as those from the Foundation Center, Philanthropy Classification System, and the NTEE System. For organizations working on global sustainability programs, a couple systems come pre-loaded with the United Nations Sustainable Development Goals.

Most systems allow you to upload your own taxonomy, usually during the implementation of the system, and maintain it over time. One question to ask is if the system allows hierarchical (or "parent-child") taxonomies, which allow you to categorize and track programs across multiple levels. Another is, does the system allow dynamic or predictive tagging that makes suggestions from the taxonomy as the user types? In addition to controlled vocabularies, does the system offer user-generated tagging of content?

Grants management systems also facilitate the due diligence process by providing the ability to look up organizations' 501(c)(3) status and check them against OFAC (Office of Foreign Assets Control) watchlists. Most systems have automated charity status checks, either by integrating with GuideStar Charity Check or by pulling data directly from the IRS Business Master File.

Differences among 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, organize custom fields into sections or tabs, and if custom fields have the same permissions as system-generated ones.

> ***Before you pay to customize a system to your existing processes, revisit the processes to see if they can be streamlined or improved.***

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.

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 by automatically logging system-generated letters and emails and allowing you to enter records of phone calls and communications sent outside the system. This is particularly important to ensuring cross-department communication and collaboration, and also coverage if an employee is out of the office or leaves the foundation.

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. Some grants management systems allow you to track these grants by business unit as well as by the organization in which it lives.

Even if a grants management system provides staff with the ability to email grantees through the system, it is unlikely that most staff will do so for routine communications. In addition to logging emails sent within the grants management system, it can be useful to capture into the system emails sent to grantees from external systems. Some systems do this by integrating with or providing plug-ins for popular email software, such as Outlook or Gmail, while others provide record-specific email addresses that users can add to the cc: line of an email to save it in the system.

The grants management process often is a series of tasks that need to be done by specific people, in a particular order. Because of this, many 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 well-defined processes.

Some systems provide tools to help grantmakers seeking to track and evaluate their diversity, equity, and inclusion (DEI) efforts. Ask if the system has the ability to collect and store demographic data for organizations, projects, and programs. A couple systems are even able to pull demographic information from an organization's GuideStar profile.

Online Applications

Grantmakers are now more likely than not to accept grant proposals through online application forms. But grants management software still varies widely in the ability to support user-friendly and streamlined online application processes. When implemented thoughtfully, online applications can eliminate the need to manage paper proposals, ensure all required information is complete upon submission, and automate compliance checks and communications.

Most systems offer either an applicant portal or role-based permissions that provide a simplified interface for organizations seeking funds. Nearly all allow grantees to register themselves and set a username and password. While some systems notify administrators of accounts with duplicate email addresses to determine if they need to be merged, other systems check for duplicate emails at the time of registration and prompt the user if an email

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

is already found in the system. New registrants can also be presented with an eligibility quiz in most systems and some systems have eligibility quizzes that can branch to multiple applications, directing users to the funding opportunities for which they qualify. Some systems support branching capabilities in online forms to collect different information from applicants based on the information they provide.

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.

It's critical to consider the experience of filling out application forms from the perspective of the grantseeker. Many systems allow applicants to avoid redundant data entry by letting them reuse information from one application to the next. Some systems avoid the frustration of data loss from computer crashes or "timeouts" by automatically saving online form entries at regular intervals.

Some systems let prospective grantees set up multiple accounts for other individuals in their organization to work on a single application—for example, to allow a financial staff member to enter budget information—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. Finally, an increasing number of systems allow two separate organizations to collaborate on a partnership application by letting one organization "associate" a staff member from the partnering organization with their organizational record or invite individuals outside the organization to work on an application.

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. One emerging trend is the ability to conduct live collaboration in which changes made by one collaborator are seen by another in real time, similar to the way shared Google documents work.

Some systems 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. Systems that have universal user accounts have now 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.

Online applications collect information from prospective grantees in a variety of field types such as text boxes, dropdown 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. You should be able to set character limits for text fields in the system and be able to display prominently to applicants how many characters are left; ideally, you can display word counts, not just character counts. Most systems also let you customize in-application help for grantees, either through hover-over text, FAQs, or more innovative means, like videos.

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

Nearly all systems will allow applicants to upload attachments, in many cases including video or audio files. Check if the file formats you need are supported and that virus scans provided by the grants management system for such uploads conform to your foundation's specifications. A few systems allow administrators to create a PDF of an application form that an applicant can fill out offline and, when it is uploaded to the system, the software can automatically pull responses from the document into the corresponding system fields. Similarly, some systems allow applicants to download an Excel spreadsheet to input their budget that can populate system fields with the data when it is uploaded.

Once applications are submitted, applicants should receive confirmation emails. Some systems let you customize the text of that email.

Many grants management systems now integrate with third-party data sources to further streamline the application process. One popular integration is with online e-signature tools, such as DocuSign or Adobe Sign. Several systems provide the ability for applicants to automatically populate applications with data from their organization's GuideStar profile just by entering the organization's EIN.

A few systems now provide some level of multilingual support for applicant portals. This ranges from changing the text on buttons and system text when the user selects the language of preference to having multiple language versions of the portal content to integrating with online translation services, such as Google Translate.

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.

Many systems allow reviewers to see and rate applications online. This allows internal staff to review applications from any location with internet access and provides an opportunity for you to involve people from outside your organization as reviewers. Some systems provide a reviewer portal so that they have simplified access to the content they need without having to navigate the full grants management interface.

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 the system auto-assign applications to reviewers based on subject and reviewer workloads? Can they flag conflicts of interest—for example, if they work for the same university as a grant applicant? Can foundation staff be notified when reviews are completed, either via email or within the system?

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? 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 aggregate comments and scores from multiple reviewers? 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? Can you create multiple workflows to manage different application processes?

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.

Communications

Grants management processes can be document-heavy. In addition to printed letters, grantmakers often need to create grant agreements and 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 document templates, which can include personalized text; mail-merged grant data; and custom formats, fonts, and logos. As board dockets can be very lengthy documents spanning hundreds of pages, consider looking into the options the system provides for downloading or viewing these files electronically.

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).

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 systems reviewed in this report offer email delivery reports including open, clickthrough, and unsubscribe rates, but most do not.

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

In general, we recommend sending broadcast emails through vendors' servers, which would mean either choosing a system that allows it 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, as that's another spam trigger.

Payments and Budgeting

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

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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.

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 payments 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? If so, will the system track the exchange rate—not just at the time of grant approval but at the time of payment?

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

Many grants management systems offer built-in integrations with widely used external accounting systems to 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.

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.

Grant Requirements & Outcomes Evaluation

Many grants include reporting, site visits, or other requirements. A number of packages provide functionality that lets you define those requirements 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.

A number of systems use online forms to collect progress reports, 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.

Measuring and evaluating impact is an important part of many foundations' giving efforts in recent years and a number of grants management systems can help facilitate this. Some systems can display outcome goals collected on grant applications to the grantee when they are completing progress reports and can calculate progress toward goals based on grantee responses. These systems also facilitate the reporting of aggregate outcome data across grantees to allow a foundation to track their progress toward program goals. Finally, for foundations measuring Diversity, Equity, and Inclusion (DEI) initiatives, some systems can capture and report on demographic data for organizations, projects, and programs.

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.

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. The range of functionality and flexibility among grants management systems in the area of outcomes measurement and tracking varies greatly. 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 software with more robust impact reporting capability.

While outcomes management has different goals than regular post-award progress reports, overall the grants management systems use the same workflow and functionality to meet both needs.

System Querying and Reporting

For a workforce accustomed to the simplicity of the Google search experience, a grants management system that offers an easy universal search is a plus. One question to ask is whether this universal search will also index and search the content of readable attachments uploaded to the system. Will it return "fuzzy" (i.e. non-exact) matches?

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 considered standard, and most software packages provide for them out-of-the-box. The ability to customize these reports to better meet your needs and save those customizations for future use can save a lot of time and money, but not all systems allow this. Also, many of the systems that do provide standard reports and queries provide a lot of them. Is there some way to customize or filter the list to bookmark your preferred reports?

From time to time you may want to build 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 for formatting and manipulation 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 rename columns, group data and perform simple calculations, and adjust. 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 or export it to business intelligence or data visualization tools.

Look carefully at the ease of use 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. Dashboards are also becoming increasingly important, and some systems allow users to configure their own dynamic views of data.

Security, Permissions, and Data Access

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 might be a better option for larger foundations with wider pools of users.

It is important to ask the vendor if there is a built-in virus scan or security feature for files that are uploaded to the system. Many cloud-hosted systems store uploaded files in an Amazon Web Services (AWS) environment, which includes a level of built-in protection from viruses and malware.

Audit logs—a record of who made updates to what fields, and when—can also be useful and, in some cases, necessary. If a system includes an audit log, check to see what actions are logged. Is it every change, or just a few core ones? How long is this audit data saved in the system and can it be retained for a longer period if necessary?

No matter the system, you own the grants data it contains. 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. It is important to 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 online third-party systems and tools, such as accounting, reporting, or board portal solutions, so that data flows from one system to the next without manual intervention, check to see how the connection is configured. Does the vendor provide a pre-built integration to the tool you need? 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? Does the vendor update custom-built integrations to maintain compatibility with system upgrades? Some require the vendor to set up any integration with external packages for you—often at extra cost.

User Experience

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 and shadow systems.

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?

All of the systems we reviewed have some level of "responsive" web design, which automatically rearranges 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 an app or dedicated mobile interface for those use cases.

Finally, it is a best practice to ensure that the grants management system you select is fully accessible to users with disabilities. While there are varying levels of website accessibility, ask a vendor if they are 508 compliant (https://www.section508.gov/manage/laws-and-policies) or if their software conforms to WCAG 2.1 standards (https://www.w3.org/WAI/standards-guidelines/wcag/).

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 and email 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 tool tips and contextual help text—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 free monthly webinars to affrodable web-based sessions to more formal training at your own offices. Ask vendors whether they have training packages and how much you will pay.

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? 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, the vendor is likely not yet at a very stable point and their long-term viability is more of a risk.

What Do These Systems Cost?

Prices for grants management systems vary widely, but costs can generally be categorized in the following buckets.

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.

Add-Ons

Many systems offer an à la carte menu of optional modules that can substantially affect the license cost.

Setup and Configuration Costs

Most vendors charge setup and configuration fees. Some vendors' pricing structures are simple, charging specific fees for analyzing and documenting your system requirements, customization, online application building, report creation, and data migration.

Maintenance and Support Packages

While most installations include some level of introductory training for staff and basic support, some systems also add on an annual "maintenance" fee to cover enhanced (i.e. phone) support.

Training Packages

Similar to the enhanced support packages, some vendors offer extended training packages that can help orient new staff to the system after the initial implementation and teach "super users" how to make the most of their systems. Training is delivered in a multitude of ways, from on-site sessions to online video libraries to webinars.

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.

Want to learn more about system pricing? As part of this report, we asked vendors to provide an overview of their pricing models. In order to provide readers with some insight into relative costs among systems with different pricing models, we also asked the vendors to estimate the costs for a hypothetical small foundation with a simple grantmaking program and a hypothetical large foundation with more complex needs.

The comparison charts beginning on page 35 include general cost estimates for each system we review in this guide, while the individual system evaluations provide insight into the vendors' pricing models.

Transitioning Systems

If you have a grants management system that's no longer meeting your needs and you're considering moving to a new system, selecting the right one only gets you halfway there—migrating your data and transitioning to the new system takes planning and effort. In this section, we walk through some of the steps you should take and questions to ask to make your own selection and transition as smooth as possible.

First off, determine why you want to change systems and decide whether it is worth the time, expense, and effort. How old is your current system? Is it still reliable? Is it still being supported by the developer or vendor? What doesn't it do now that you would like it to do? Are there any system add-ons or updates that could meet your needs?

Once you decide to move forward, the next step is to pull together a list of your own requirements and develop a Request For Proposal (RFP). Many organizations consider bringing in outside consultants to help with this stage, relying on their expertise to develop the requirements and RFP and to identify several systems that might meet their needs. A software selection consultant can be a good idea if your foundation does not have in-house expertise or experience in evaluating and selecting technology vendors.

> ***A software selection consultant can be a good idea if your foundation does not have in-house expertise or experience in evaluating and selecting technology vendors.***

Just as you began by defining why there was a need to change systems, now is the time to catalog what your current system does, what works well, and what can be improved. Talk to current and potential users, both to build organization-wide buy-in for a new system and also to identify existing needs and pain points. Hopefully this will result in a list of features and functionality that you can prioritize and group by importance. You can use this list as the foundation for your RFP. (TechSoup has put together a library of tips and techniques on writing RFPs, along with sample RFPs for a variety of different types of software systems: https://www.techsoup.org/support/articles-and-how-tos/rfp-library)

With this list of features in hand, narrow down the search for a system to meet your specific needs. This *Consumers Guide* can be your first step, but you should also reach out to your peers at similar organizations to ask what systems they use and if they have any recommendations. If you attend industry conferences, seek out roundtables and workshops on grants management tools and talk to vendors in attendance about the strengths and limitations of their systems.

Once you cull the list of potential matches down to a manageable size, reach out to those vendors with your RFP and ask them to schedule system demos. It's helpful to provide vendors with background information on your current system, processes, and challenges, along with a list of features you need to see demonstrated. Most demos will be led by individuals in the sales group who want to show you all the ways the software can do what you need it to—it's important to look deeper and ask specific questions about how it can meet your needs. If the vendor says the software can do something, ask them to demonstrate it for you.

Ask about pricing and what features or services will cost additional money. If there is functionality that is non-negotiable (e.g. required by your fiscal/audit policies or compliance with government or industry regulations, such as GDPR or HIPAA), make sure you receive assurance in writing that the system has the necessary certifications or functions.

If you ask about a feature not currently available in the system, you may hear that it is "in development," "on the product roadmap," or "going to roll out in Q4." Ask the vendor to be specific about what the update will do and how to make sure that it will meet your needs. Ask about processes for implementation and training and how they will handle migrating data from your current system to the new one.

Following the demos, you should be able to narrow your list to two or three finalists. To help make your final decision, ask each vendor for references and talk to current clients. Ask the vendors to provide you with a "sandbox" version of the system so you can try your hand at using it.

Once you've made a decision and signed a contract, consider whether you have the in-house expertise to implement it successfully. An implementation consultant experienced with the system you've chosen can help you ensure a smooth implementation and improve user adoption. Experienced consultants can help you avoid miscommunications and common pitfalls that can cause extra work or a delay in launch.

The onboarding process for a new grants management system is one of the most critical points in implementation. You will likely be working with a different team of vendor representatives than during the sales process, and you'll be facing a number of critical decisions. You may be tempted to try to map your existing processes to the new system; instead, work with the vendor's implementation team to undertake a full discovery effort.

As they get to know your organization, they should look at your existing system, understand your goals, help identify use cases, and recommend changes to your workflows or processes that will make the new system more efficient and user-friendly. With this information they can then start putting together an implementation that can result in the system that meets your needs.

COMPARING GM SYSTEMS ▶▶▶

The grants management systems evaluated in this guide share a great deal of functionality in how they address common requirements. So this section looks at the areas of differentiation to help foundations find the best system for their own needs.

We've identified the following six areas in which systems provided unique or enhanced features:

- Low-Cost Solutions for Smaller Foundations
- Systems with Features to Assist Non-Technical Users
- Systems that Simplify the Applicant Experience
- Systems with Strong Application Review Features
- Systems that Facilitate Outcomes Measurement and Evaluation
- Systems for Global Grantmakers

In addition, we identified notable features that may be of interest to foundations with more specific needs. You'll find these at the end of this section.

Low Cost Solutions for Smaller Foundations

Pricing varies widely—not just across different systems, but even within some systems' own configurations (based on optional modules and integrations). Four of the systems we evaluated provided a solid set of grants management tools for small grantmakers who are looking for simple functionality at a low price point.

	Small grant-maker, first year cost	Small grant-maker, ongoing	Pricing Model
Foundant	$5,000	$3,500	Pricing for the system is based on the complexity of workflow needs. The Basic package includes the ability to manage up to two grant programs in the system but limits a foundation to 100 requests (or applications) a year.
SmartSimple	$12,000 and up	$6,000 and up	SmartSimple's subscription fee is based on the number of users and the level of access for each user. "Direct" implementation provides a simple grants management system and quick implementation for organizations with low volume or basic granting needs.
SurveyMonkey Apply	$7,000	$7,000	Pricing for the system is based on number of programs and the number of expected applicants. Implementation services are included in the subscription cost.
Zengine by WizeHive	$3,900-$9,995	$3,900-$9,995	Subscription pricing is generally divided into three levels: Core, Premium, and Enterprise. Pricing is based on several factors, including the number of programs, program complexity, and required features. There is no implementation cost for the Core package.

Other lower-cost options to consider include **Blackbaud Grantmaking**, which offers tiered pricing for the system based on the number of users and modules. An entry-level client using only the core system could acquire the system for about $3,900 per year, but optional modules increase the cost. The vendor did not provide specific pricing for **Submittable** but a subscription to the full suite of grants management tools for a small foundation with a low volume of applications is in the range of $5,000-$10,000. Pricing provided by **WebGrants** estimates the annual recurring cost for a small foundation is approximately $6,600; however, first year (implementation + subscription) costs are on the higher end of the systems we evaluated, likely running approximately $50,000 for a small foundation.

Systems with Features to Assist Non-Technical Users

As the number of people who use a grants management system at a foundation increases, so does that likelihood that those users will have a wide range of comfort with technology. The following systems provide features that make the system easier to navigate and use for people who are less technically-inclined.

CyberGrants. The system provides an easy-to-navigate interface, an intuitive report builder that can be used by non-experts, and role-based tabs visible to users based on permission level that contain information relevant to different types of users. An executive tab can show the high-level health of programs, whereas grants administrator tabs can be more action-oriented and task-based.

Fluxx Grantmaker. Users can choose to view system data in a table view or displayed in a series of unique, customizable, card-based dashboard interfaces. The system provides a series of dashboard templates to help organize the cards to meet different user needs. Administrators can also configure role-based dashboards.

GivingData. The system interface provides easy-to-read text, large icons, and contrasting colors for action buttons and labels. Menu items are clearly labeled and sections with alerts or items needing attention are marked with orange exclamation points. The system also offers a "Grantee 360" timeline, which includes icons representing grants, payments, requirements, interactions, and "key moments" related to an organization. Users can zoom in on the timeline to focus on one particular segment and click on an icon to go to the corresponding record.

Submittable. Applications and other forms are easy to create, format, and assign to reviewers. All forms and reports are created using drag-and-drop functionality. The administrative interface for the system is simple and easy to learn, but the ability to customize this interface is limited. The level of system access for users is governed by five pre-set roles.

SurveyMonkey Apply. Much of the system is built to provide non-technical users the ability to perform a wide range of tasks. Workflows are created through drag-and-drop functionality that allows a user to add a stage and then work through a series of screens that define what happens in the stage. Automations are easy to create, with plain-language instructions. Role-based interfaces allow administrators to simplify system views for casual users.

Other systems that simplify features for more casual users include **Blackbaud Grantmaking**, which provides more than 200 standard reports and lets users mark their favorite reports so that they can easily be found. Administrators can configure dashboards for each user that include charts and tables that allow the user to drill down for more information and can create a simplified dashboard for casual users, such as executive leadership. **foundationConnect** gives administrators the ability to build "flows" for less-technical users, which are step-by-step screens that walk users through specific tasks or processes, such as data entry.

Systems that Simplify the Applicant Experience

The need to apply for grants via online applications can often be an obstacle for resource- and time-strapped nonprofits—particularly those that represent marginalized communities. Online system processes, challenges, and constraints can add significant time to the applicant experience.

A number of systems are now trying to address this issue with features that reduce the burden on applicants. Many systems have (or can implement) integrations with Candid's GuideStar for Grant Applications or the IRS Master Business File that allow applicants to auto-fill profile information for their organizations on an application by entering their tax identification numbers.

Systems that help reduce the time and effort required of applicants include the following:

Blackbaud Grantmaking. The system can pre-load information from previous applications into the application form.

CC Grant Tracker. In addition to asking applicants to enter budgets via the online form, administrators have the option of providing an Excel and/or PDF template for an applicant to download, complete, and upload that parses the data into the corresponding system fields. The vendor reports that it has completed a proof-of-concept that would allow an applicant to fill out an offline form for a simple application that can be uploaded and parsed into the corresponding fields, but this is not yet included as core system functionality.

SmartSimple. Two features of the system are especially helpful to foundations that work with grantees that have low or unreliable online connectivity. The first is a PDF parser that allows an administrator to generate a PDF application or form and email it to an applicant. The applicant can fill out the form offline and email it back to the administrator; when the completed application is uploaded, all data from the completed form is automatically saved to the corresponding fields in the system. This can work for any form in the system, including application reviews, progress reports, and site visits. The other feature is a Microsoft Excel parser that can extract values from Excel files and map the data into a variety of fields. This can allow applicants to upload budgets in Excel documents that can be mapped to fields in the system.

Submittable. Organizations only need one account in the system to apply for grants from any grantmaker using Submittable, which eliminates the need to maintain multiple organization profiles and login credentials.

Zengine by WizeHive. The system allows applicants to download an Excel csv of the application form that can be filled out offline, uploaded, and parsed into system fields, which can be helpful for applicants with low internet connectivity.

Systems with Strong Application Review Features

Managing the review process for grant applications can be incredibly time-consuming for foundations, especially those with a large number of external reviewers, complex review workflows, and/or a high volume of applications. The following systems can ease unruly review processes and enhance reviewer experiences:

CC Grant Tracker. Reviewers access applications assigned to them through a portal that displays items for review as links to PDFs of the application form that the reviewer can view onscreen or download as a package. Reviewers can self-identify as interested in reviewing an application via the "Request and Conflict" function, which provides reviewers with a list of applications in the pool, links to application summaries, and the ability to indicate if they have a conflict of interest or an interest in reviewing. The system also allows for an algorithm-based auto-assignment of applications to reviewers that takes into consideration review workload and expertise. In addition, "Live Meeting" functionality facilitates panel or board meetings by allowing reviewers to see comments and scores on applications and allows administrators to create and distribute board dockets, record attendance linked to the meeting, and share meeting agendas.

CyberGrants. Reviewers log in to the administrative interface of the system, with role-based access providing simplified views, but can also be provided additional system permissions that increase the number of options they see on their interface. Administrators can configure as many workflows as they need and layer in different levels of logic (e.g. to segment applications by grant size); reviewers receive automatic notification when they are assigned an application. Vendor configuration can provide foundations with the option of allowing reviewers to see comments and scores from other reviewers, and with the ability to randomly assign reviewers to applications based on workflows or other characteristics.

SmartSimple. Reviewers can be assigned to applications individually or as part of a panel group and assignment can be automated so that the system will assign them based on a set of defined business guidelines. An administrator can also create a workflow to check for reviewer conflicts of interest before making an assignment. Reviewers receive automatic notification when they are assigned an application and can log into a reviewer portal to see the applications assigned to them. Administrators can allow reviewers to see the relationship history that the foundation has with an organization as well as other reviewers' scores. Reviewers can also complete reviews offline via a form created with the PDF parser, and a user can upload the completed form to the system.

SurveyMonkey Apply. On login, reviewers see a list of programs and stages that contain their active assignments. While the system does not support the creation of grant summaries, reviewers can choose to export a PDF for each application assigned to them, a PDF for each application with attachments in their original format, or a single PDF with all selected applications. Reviewers who prefer to work offline can download applications and, after completing their reviews, enter responses in a simple "quick review" form. Reviewers can be assigned to applications manually or an administrator can enable automatic review assignments that either distribute applications randomly or auto-assign reviews based on custom criteria. Reviewers can also mark applicants with a conflict of interest and the system will store that information and not assign them reviews of that applicant's submissions in the future.

Systems that Facilitate Outcomes Measurement and Evaluation

Collecting and evaluating data related to impact has grown in importance in recent years. Grants management systems often facilitate this by allowing foundations to use custom fields to collect and report on a variety of different types of data. Several systems have built separate modules that allow foundations to define programmatic or organization outcomes, allow applicants to set their own goals based on these pre-defined metrics, and collect and evaluate the data submitted by grantees on progress reports. These systems include the following:

Amp Impact. Users can add indicators to a grant, either chosen from a catalog of previously defined indicators or custom-created. Applicants can choose which of these indicators to use when defining their grant outcomes. The data related to these indicators can connect to foundation objectives or outcomes through a framework. The system also allows for the reporting of indicators as disaggregated data, and allows administrators to define which disaggregation group(s) to use. Outcomes can be analyzed at the grant and program levels and also across a foundation's entire portfolio. Dashboards display progress toward outcomes using a variety of charts and graphs.

Blackbaud Grantmaking. An optional Outcomes module allows for in-depth collection and tracking of outcomes metrics. This module allows foundations to define specific outcomes that tie back to overall program goals and surface them to an applicant during the application process so that the applicant can select and define which metrics apply to their grant. A taxonomy based on the U.N. Sustainable Development Goals is built into the Outcomes module. The outcomes reporting is accessed in the module rather than via the report manager, and allows users to track progress toward goals for each grant and to summarize this data at the programmatic level.

CC Grant Tracker. CC Grant Tracker supports impact measurement by allowing a foundation to define results frameworks or log frames at a grant, program, and organizational level. An administrator defines outcomes and impacts for programs and grants in the system and an applicant can select metrics from those defined elements during the application process. Grantees can then report on the progress toward those outcomes and that data is used to automatically calculate progress toward the grant outcomes and also can be aggregated on a project level and across a portfolio of projects. Each program in the system has a results-monitoring dashboard that displays the program's metrics. The system also enables the capture and reporting of data along demographic and economic categories. In addition to the outcomes dashboards, each project has a "Lessons Learned" section that allows users to capture project experiences and record learnings that can be applied to future projects.

First Akoya.net. First Akoya.net includes a module to track outcomes across programs. An administrator defines outcome measures for a program, and during the application process, applicants choose a measure (or measures) and provide their goals for that measure. When grantees submit progress reports online via eGrant.net, the data they enter for that outcome will be added to the system to allow a foundation to evaluate outcomes by program, by grantee, and for the foundation as a whole in a single year and over multiple years. The system can also accommodate the collection of qualitative data for outcomes, but this requires some additional configuration work by the vendor.

foundationConnect. The system includes a separate Outcomes module that allows users to define different narrative or quantitative outcomes that grantees can select during the application process and report on outcomes across a portfolio. Users can create impact dashboards that show all outcomes across grants and programs.

GivingData. Grantee progress reports feed into GivingData's learning and evaluation framework, which uses a three- or five-degree scale to capture progress toward outcomes that were defined in the application and automatically calculates how many grants follow in each category for each outcome.

Systems for Global Grantmakers

Foundations that provide grants in multiple countries face their own set of challenges. Grants management systems can help ease some of those challenges by providing support for grants made in multiple currencies and by providing the ability for foundations to provide content in multiple languages. Systems that can help in these areas include the following:

Amp Impact. Clients can take advantage of Salesforce's multi-currency abilities to manage grants made in different currencies. Administrators are able to set and update exchange rates within the system.

Blackbaud Grantmaking. The system allows foundations to make payments in different currencies and report in dollars. Exchange rates are adjusted manually and an administrator can choose to update the exchange rate for previously awarded grants when a change is made, or apply it only to new grants. At this time, the system does not provide multilingual support.

CC Grant Tracker. The system allows grant applicants to apply for funds in their own currencies, and the system holds the exchange rates using a client's Bloomberg feed. Exchange rates can be snapshot at the time a grant is awarded or can be set to use the current live rate. The vendor reports that it can also create a multilingual portal for applicants through custom development work.

CyberGrants. The applicant/grantee portal includes support for 14 languages, and the applicant/grantee can choose the language of the portal experience. The administrative interface is only available in English, but the system will store applicant/grantee responses in the language used.

Fluxx Grantmaker. Each grant and payment record can store the amount in both local and base currencies. By default, currency exchange rates are pulled and updated from the European Central Bank on a daily basis, and the vendor reports that clients can link to another exchange rate source through API as desired. Currency rates can also be updated on a grant-by-grant basis if necessary. The vendor reports that it is developing multilingual support and expects to release this functionality in 2020.

foundationConnect. Clients can take advantage of Salesforce's multi-currency abilities to manage grants made in different currencies. Administrators are able to set and update exchange rates within the system. The system provides a level of multilingual support for grantee portal users—applicants can choose a language when logging into the portal, which will change the language that appears on system buttons and section headers but not foundation-created content.

SmartSimple. The system supports more than a dozen languages, and each field supports multilingual captions, help text, and validation messages. When users select their language of choice, the related language captions are displayed. Narrative data can be translated through a native Google Translate integration and clients may also provide language-specific translation files.

SurveyMonkey Apply. The system offers multilingual support for English, French, and Spanish that will translate all of the interface text when selected. The vendor can also provide a translation template once a site is built so that the client can create and upload translations for their own forms.

Systems with Additional Notable Features

In addition, we identified the following notable features that may be of interest to foundations with more specific needs:

Advanced Customer Relationship Management (CRM)

Several systems go beyond simple tracking of organization and contact interactions to provide deeper relationship management abilities.

Amp Impact and **foundationConnect** are built natively in Salesforce and do not require an integration for contact management. Many actions can be completed directly from Outlook, Office 365, and Gmail accounts, without having to log in to the grants management system.

First Akoya.net is created in Microsoft Dynamics 365, and a deep integration with Office 365 allows contacts, emails, appointments, and tasks set in either Outlook or First Akoya.net to appear in both systems. In addition to storing all system-generated letters and emails for each grant, once you connect an email in Outlook back to a request or opportunity, all replies go back to that record. Additional interactions (such as phone calls, tasks, and site visits) can be stored in the "Activities" section of a record, with the system holding a variety of different activities that each have distinct fields to capture related information.

Risk Management

Three systems provide the ability to define and track risks to grantmaking programs.

Amp Impact recently released a robust risk management module developed in collaboration with funders and the Open Road Alliance that allows grantmakers to link risks to indicators or objectives, add risk assessments, and submit these assessments for review. These risks roll up to a grant or can be viewed across a foundation's portfolio of grants to get a full view of the level of risk a foundation faces with its grant programs.

CC Grant Tracker's risk register allows users to define and track risks in a variety of categories at the project/grant level and also at the program level. Users can access a consolidated view of risks across all grants.

Fluxx Grantmaker allows foundations to add a risk register to records to track potential risks, the likelihood of their occurrence, their potential impact, their severity, and mitigation strategies.

COMPARISON CHARTS ▶▶▶

These charts include cost estimates for each system we review in this guide, for both a minimal implementation of the package typical for small organizations and a complex installation for a larger organization. *Note*: 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.

The gray rows mark the start of each section of ratings criteria. All the criteria align with the features rubric beginning on page 127. You can read the ratings in the context of each system's review beginning on page 44. For an interactive version of this chart, visit www.idealware.org/reports/gms2020.

B	**Basic:** The system meets the basic requirements for this criteria as defined in the rating rubric.
S	**Standard:** The system meets the standard requirements for this criteria as defined in the rating rubric.
A	**Advanced:** The system meets the advanced requirements for this criteria as defined in the rating rubric.
N/A	**Not Applicable**. The system does not meet any criteria defined in the rating rubric.

	Amp Impact	Blackbaud	CC Grant Tracker	Cybergrants	FirstAkoya	Fluxx Grantmaker
Small Org, First Year	$25,000	N/A	$30,000 +	Vendor declined to provide	$29,900	$30,000
Small Org, Annual Recurring	$5,000	$3,900	$15,000 +	Vendor declined to provide	$11,000	$15,000
Large Org, First Year	$90,000	N/A	$90,000 +	Vendor declined to provide	$41,000	$50,000
Large Org, Annual Recurring	$50,000	$42,000	$45,000 +	Vendor declined to provide	$15,000	$25,000
Grant, Contact & Organization Records	S	A	S	S	A	A
Grant Tracking	S	S	S	S	S	S
Organization Records	S	S	S	B	S	S
Contact Records	A	S	S	S	A	S
Relationship Management	A	A	A	S	A	A
Record Updates	S	S	S	S	S	S

	Amp Impact	Blackbaud	CC Grant Tracker	Cybergrants	FirstAkoya	Fluxx Grantmaker
Field Customization	S	S	S	S	S	S
Custom Fields	S	S	S	S	S	S
Attachments	A	A	A	B	A	A
Categorization	B	B	B	A	B	B
Demographic Data Collection	S	A	S	S	S	S
Task Management	A	A	A	A	A	A
501(c)(3) Status	N/A	A	N/A	A	S	S
Currency Handling	A	A	A	S	S	A
Grant Applications	S	S	S	A	S	S
Online Applications	S	A	S	S	B	S
Collaboration	A	A	A	A	B	A
File Uploads	S	S	S	S	S	S
Account Creation/ Login	S	B	S	S	S	B
Auto-population	S	A	S	S	S	A
Branching	B	A	S	A	A	A
Customization - Appearance	B	S	S	S	B	S
Customization - Fields	S	S	S	S	S	S
Multilingual Content	S	B	S	A	B	B
Application Review	S	S	A	A	S	S
Application Review	S	S	S	S	S	S
Scoring/Rating	A	A	A	A	A	A
Reviewer Access	A	B	A	A	B	A
Review Workflow	S	S	A	A	S	S
Communications	S	S	A	S	A	S
Sending Email	A	S	A	A	A	A
Automated Emails	S	S	S	S	S	S
Templates	S	S	A	A	A	S
Letters	B	A	A	A	A	A
Board Materials	B	S	S	N/A	B	B
Payments & Budgeting	S	A	S	A	S	A

	Amp Impact	Blackbaud	CC Grant Tracker	Cybergrants	FirstAkoya	Fluxx Grantmaker
Payment Schedules	S	S	S	S	B	S
Payment Approval	S	A	A	A	A	A
Payment Details	A	A	A	A	A	A
Payment Types	S	A	S	A	A	A
Payment Reporting	S	S	S	S	S	S
Budget Tracking	S	S	S	S	S	S
Forecasting	A	A	A	A	A	A
Grant Requirements & Outcomes Evaluation	A	A	A	S	A	A
Requirements Tracking	S	A	A	S	A	A
Progress Reports	A	S	A	A	A	A
Evaluation	A	A	A	S	A	A
System Querying & Reporting	A	A	S	S	A	A
Search	S	A	A	S	S	S
Pre-packaged Reports	A	A	S	S	A	A
Customizing Reports	S	S	S	S	S	S
Report Dashboards	A	A	B	A	A	A
Ad Hoc Reports	S	S	S	S	S	S
Security, Permissions, & Data Access	S	S	A	S	S	S
Access Control	S	S	A	S	A	S
Audit Log	S	S	S	S	S	S
Login Security	S	S	A	A	A	S
Data Security	B	A	A	S	S	A
Data Exports	A	S	A	A	A	S
Integrations	S	S	S	S	S	S
Virus Protection	B	S	S	S	N/A	S
Backup & Recovery	S	S	S	S	S	S
User Experience	S	S	S	S	S	S
Support & Training	A	S	S	S	S	S
Technical Support	A	A	A	A	A	A
Training	A	S	S	S	S	S

	Foundant	Foundation Connect	GivingData	SmartSimple	Submittable
Small Org, First Year	$5,000	Vendor declined to provide	$10,000+	$12,000+	Vendor declined to provide
Small Org, Annual Recurring	$3,500	Vendor declined to provide	$5,000+	$6,000+	Vendor declined to provide
Large Org, First Year	$8,750	Vendor declined to provide	$50,000+	$35,000+	Vendor declined to provide
Large Org, Annual Recurring	$7,500	Vendor declined to provide	$25,000+	$12,000+	Vendor declined to provide
Grant, Contact & Organization Records	S	A	S	A	B
Grant Tracking	S	S	S	S	S
Organization Records	B	S	S	S	N/A
Contact Records	B	A	S	S	N/A
Relationship Management	B	A	A	A	B
Record Updates	S	S	S	S	S
Field Customization	S	S	S	S	B
Custom Fields	S	S	S	S	S
Attachments	A	A	A	A	A
Categorization	B	B	S	B	B
Demographic Data Collection	S	S	S	A	S
Task Management	A	A	A	A	S
501(c)(3) Status	S	S	B	A	N/A
Currency Handling	B	A	B	B	B
Grant Applications	A	S	S	A	S
Online Applications	A	S	S	A	S
Collaboration	A	A	A	A	A
File Uploads	S	S	S	S	S
Account Creation/ Login	S	S	S	S	S
Auto-population	A	A	A	A	B
Branching	A	N/A	N/A	A	S
Customization - Appearance	S	B	B	S	S

	Foundant	Foundation Connect	GivingData	SmartSimple	Submittable
Customization - Fields	S	S	S	S	S
Multilingual Content	A	S	B	A	S
Application Review	S	S	B	A	S
Application Review	S	S	S	A	S
Scoring/Rating	A	A	N/A	A	A
Reviewer Access	S	A	N/A	A	B
Review Workflow	S	S	N/A	A	S
Communications	A	S	B	A	B
Sending Email	A	A	B	A	S
Automated Emails	S	S	S	S	S
Templates	A	A	S	A	B
Letters	A	B	S	A	N/A
Board Materials	S	B	B	S	N/A
Payments & Budgeting	S	S	A	A	B
Payment Schedules	B	S	S	S	B
Payment Approval	S	A	A	A	B
Payment Details	S	A	A	A	B
Payment Types	S	S	A	A	N/A
Payment Reporting	S	S	S	S	S
Budget Tracking	S	S	S	S	B
Forecasting	B	A	A	A	N/A
Grant Requirements & Outcomes Evaluation	A	A	A	A	B
Requirements Tracking	A	A	S	A	B
Progress Reports	A	A	A	S	S
Evaluation	A	A	A	A	N/A
System Querying & Reporting	B	A	S	A	B
Search	B	S	S	A	S
Pre-packaged Reports	S	A	A	A	A
Customizing Reports	B	S	B	S	B

	Foundant	Foundation Connect	GivingData	SmartSimple	Submittable
Report Dashboards	B	A	S	A	N/A
Ad Hoc Reports	S	S	S	S	B
Security, Permissions, & Data Access	S	S	S	A	S
Access Control	S	A	S	A	B
Audit Log	S	S	S	S	S
Login Security	A	S	A	A	A
Data Security	A	B	A	A	S
Data Exports	S	A	S	A	A
Integrations	B	S	S	S	S
Virus Protection	B	B	B	S	B
Backup & Recovery	S	S	S	S	S
User Experience	S	S	S	S	S
Support & Training	S	B	S	S	S
Technical Support	A	S	S	A	A
Training	S	N/A	S	S	S

	SurveyMonkey Apply	WebGrants	Zengine by WizeHive
Small Org, First Year	$7,000	$50,000	$3,900-$9,995
Small Org, Annual Recurring	$7,000	$6,600	$3,900-$9,995
Large Org, First Year	$12,000	$150,000	$12,000-$65,000
Large Org, Annual Recurring	$12,000	$13,200	$10,000-$50,000
Grant, Contact & Organization Records	S	S	S
Grant Tracking	S	S	S
Organization Records	S	S	S
Contact Records	B	S	S
Relationship Management	B	B	B
Record Updates	S	S	S
Field Customization	S	S	S
Custom Fields	S	S	S
Attachments	A	S	A
Categorization	S	B	B
Demographic Data Collection	S	S	S
Task Management	A	A	A
501(c)(3) Status	S	N/A	B
Currency Handling	B	B	B
Grant Applications	A	S	S
Online Applications	S	S	S
Collaboration	A	S	S
File Uploads	S	S	S
Account Creation/ Login	S	B	S
Auto-population	A	S	S
Branching	A	S	S
Customization - Appearance	B	S	B
Customization - Fields	S	S	S
Multilingual Content	A	B	B

	SurveyMonkey Apply	WebGrants	Zengine by WizeHive
Application Review	S	S	S
Application Review	S	S	S
Scoring/Rating	A	A	A
Reviewer Access	S	A	B
Review Workflow	A	S	S
Communications	B	A	S
Sending Email	A	A	B
Automated Emails	S	S	S
Templates	S	A	S
Letters	B	A	S
Board Materials	N/A	B	S
Payments & Budgeting	B	S	S
Payment Schedules	B	S	S
Payment Approval	A	A	A
Payment Details	S	S	S
Payment Types	N/A	S	A
Payment Reporting	B	S	S
Budget Tracking	B	S	S
Forecasting	B	B	S
Grant Requirements & Outcomes Evaluation	S	A	A
Requirements Tracking	A	A	A
Progress Reports	S	A	S
Evaluation	S	A	A
System Querying & Reporting	S	S	S
Search	S	S	A
Pre-packaged Reports	A	S	B
Customizing Reports	B	B	B
Report Dashboards	N/A	A	S
Ad Hoc Reports	S	S	S

	SurveyMonkey Apply	WebGrants	Zengine by WizeHive
Security, Permissions, & Data Access	S	A	S
Access Control	S	A	S
Audit Log	S	S	S
Login Security	A	A	A
Data Security	S	A	S
Data Exports	A	A	A
Integrations	S	S	S
Virus Protection	S	S	B
Backup & Recovery	S	S	S
User Experience	S	S	S
Support & Training	S	S	S
Technical Support	A	A	A
Training	S	S	S

REVIEWS OF THE GRANTS MANAGEMENT SYSTEMS

The following reviews look more closely at each of the systems that met our eligibility criteria for inclusion in this guide. For each we used a simple rating (Basic, Standard, Advanced) to compare the strengths and weakness against requirements criteria in 12 key areas:

- Grant, Contact & Organization Records
- Grant Applications
- Application Review
- Communications
- Payments & Budgeting
- Grant Requirements & Outcomes Evaluation
- System Querying & Reporting
- Security, Permissions, & Data Access
- User Experience
- Support & Training
- Stability in the Market
- Customer Experience Survey

Your foundation should decide which criteria is important for its own needs, and thus may rate criteria differently than we did, but this rating system can be a starting point for comparison.

For each system review, we've also provided results from our customer experience survey, including how many people reported using the system, in the survey; scores in a range from -2 to 2 based on those users' reported experiences with the training, support, and implementation offered by the systems' vendors; and what a weighted percentage of those respondents would recommend the system to others. We've reprinted the content of the survey in Appendix C beginning on page 135.

You can also find these reviews in the online version of this guide at [http://www.idealware.org/reports/gms2020.](http://www.idealware.org/reports/gms2020)

Amp Impact

https://www.verasolutions.org/ampimpact/

Amp Impact by Vera Solutions is one of two grants management systems reviewed in this guide natively built on the Salesforce platform. Originally developed to help grantmakers measure and evaluate the impact of their grants programs, the system has evolved into a highly-configurable, full-featured grants management solution. Most of the vendor's clients are outside the U.S. and the system provides a number of features to help global grantmakers, including multi-currency and multi-language support.

The strengths of the system lie in Salesforce's advanced relationship management tools and the ability to define and evaluate impacts, outcomes, and objectives. The outcome measurement tool allows foundations and grantees to easily define logical frameworks and to report on these measures at a variety of levels. The vendor recently released a robust risk management module developed in collaboration with funders and the Open Road Alliance that allows grantmakers to link risks to indicators or objectives, add risk assessments, and submit these assessments for review. These risks roll up to a grant or can be viewed across a foundation's portfolio of grants to get a full view of the level of risk a foundation faces with its grant programs.

Pricing is set up in a tiered approach based on the total portfolio size of the grants managed within the package, starting at $5,000 a year for nonprofits. Implementation pricing is related to the complexity of the setup and can range from $20,000-$200,000 and up.

Small Org, First Year: $25,000
Small Org, Annual Recurring: $5,000
Large Org, First Year: $90,000
Large Org, Annual Recurring: $50,000

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- A **Contact Records:** Advanced
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- **501(c)(3) Status:** N/A
- A **Currency Handling:** Advanced

Amp Impact combines solid grant tracking functionality with the robust CRM tools of Salesforce. Grants can be tracked in a variety of ways and linked to related records. Organization and contact records are Salesforce CRM objects and allow foundations to track individual business units within a larger organization, associate multiple contacts with an organization, and communicate with contacts according to their relationships with the grant or organization. All system-generated interactions are recorded for each grant and Salesforce's deep integration with Outlook allows users to work with contacts, tasks, and more without having to log into the system.

Administrators can specify the names of fields displayed in the administrative interface, define dropdown values for fields such as grant codes, and collect and organize a great deal of additional data using a variety of custom field types. This can include demographic and economic data about the organization and administrators can create sections within records to group and organize the custom fields. The system taxonomy is set up during implementation. In addition, the system also comes pre-loaded with the UN Sustainable Development Goals to assist with monitoring outcomes.

At this time, the system does not include an integration to check an organization's status against a registry of 501(c)(3) nonprofits, but the vendor reports that it has previously developed a similar custom plugin. Amp Impact does include Salesforce multi-currency support and allows administrators to set up and update exchange rates within the system.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- S **Autopopulation:** Standard
- B **Branching:** Basic
- B **Customization - Appearance:** Basic
- S **Customization - Fields:** Standard
- S **Multilingual Content:** Standard

Individuals and organizations can apply for grants online via the applicant/grantee portal, which uses Salesforce Communities. Foundations can configure the look and feel of the community easily by using the Community Builder or adding their own CSS. New applicants can create accounts; the administrator can configure the system to notify applicants if their email address already exists in the system or to allow duplicate records that can be reviewed and merged.

Users can create a variety of different types of online forms via the Amp Impact Submissions functionality, including online applications, but there are a limited variety of question types, and advanced functionality such as branching is not yet available. Grantmakers can opt to use a tool such as FormAssembly from the Salesforce AppExchange for more robust application customization and functionality. The vendor also reports that it is developing a plugin to take advantage of Salesforce's native features to provide additional out-of-the-box application management functionality.

The system allows collaboration on applications both among employees at the same organization and with external partners. Applicants have the option to fill out their budgets online or download an Excel template, fill it out, and upload it so that it populates the budget fields in the system. Amp Impact also uses Salesforce's multilingual capabilities to provide applicants with the ability to select a language when logging into the portal, which changes the language that appears on system buttons, field labels, and pick-list values, but not the foundation-created content or data. The vendor reports that it is developing a feature for release in 2020 that will allow both clients and grantees to view and export data in up to four languages.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- S **Review Workflow:** Standard

As with the applicant/grantee portal, reviewer portals also use Salesforce Communities. When an administrator assigns a reviewer to an application, the reviewer will receive an email notification to log into the portal. On login, reviewers can view grant summaries and their assigned applications, download and print applications, access organization information if it has been shared with them, and provide comments and ratings. Additional system permissions can be assigned to reviewers to extend what they can see and do. They are not able to see other reviewer scores without custom configuration. The system supports the creation of different information and scoring schemes for different programs and multiple workflows for grant review processes. Administrators can view and report on the numeric review scores and see the results plotted on a radar chart.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- S **Templates:** Standard
- B **Letters:** Basic
- B **Board Materials:** Basic

The system allows users to send emails to individuals and groups and to attach files to those emails. The emails can use templates already set up in the system or users can save new templates based on emails they create. These templates can include merge fields and attachments.

A third-party app, such as S-Docs, Conga Composer, or DocuSign Gen, needs to be used to create letters and documents in the system, but these apps allow users to create templates and include merge fields.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- S **Payment Schedules:** Standard
- S **Payment Approval:** Standard
- A **Payment Details:** Advanced
- S **Payment Types:** Standard
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

The Amp Impact Disbursement feature allows users to define payment schedules—either for all grants with the ability to adjust amounts and dates or on a grant-by-grant basis. Grantees can view the payment schedule for their awards online through the grantee portal and provide banking information to allow wire transfers. Payments can be made contingent on a grant requirement and users can see upcoming scheduled payments and whether grantees have met the requirements linked with that payment. Configuration is needed to automatically hold payments based on requirements. Payments can be exported to accounting or the vendor can integrate with an accounting system to allow two-way exchange of data. Payments can include notes. Users can generate a report of payments made and the amount scheduled to be paid out in a given year.

The system allows foundations to track budgets in hierarchically defined categories or program areas and by either the amount available, awarded, or paid in a particular year. The Disbursement features does not natively include the ability to split grants across more than one program for budgeting purposes, but the vendor reports that this can be done via the Salesforce interface by using the Amp Impact Allocations feature. Users can predict cash flow needs for a specified time period with scheduled payment data and the system allows users to generate reports showing current year payments to date plus projections for anticipated payments for one grantee, for a program area, and for all grantees.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- S **Requirements Tracking:** Standard
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

Amp Impact has advanced tools for tracking requirements and evaluating outcomes. Grantees can track grant requirements associated with their award via the grantee portal and receive notification of missing requirements. The Amp Impact Submissions feature allows administrators to create progress reports that grantees can fill out online and the data from those reports can be used to assess progress toward grantee outcome goals. The system also provides both funders and grantees the ability to create work plans to track activities and milestones that can be visualized in an interactive Gantt chart.

Users can add indicators to a grant, either chosen from a catalog of previously defined indicators or custom-created. Applicants can choose which of these indicators to use when defining their grant outcomes or required indicators can be added automatically to a grant based on its thematic areas. The data related to these indicators can connect to foundation objectives or outcomes through a framework. The system also allows for the reporting of indicators as disaggregated data and allows the administrator to define which disaggregation group(s) to use. Outcomes can be analyzed at the grant and program levels and also across a foundation's entire portfolio. Dashboards display progress toward outcomes using a variety of charts and graphs.

SYSTEM QUERYING & REPORTING

- A **Overall Section Rating:** Advanced
- S **Search:** Standard
- A **Pre-packaged Reports:** Advanced
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

The system allows users to search for grants and applications by a number of criteria and view reports based on the filtered set of grants. There is a universal search bar at the top of the screen that can retrieve results from all data fields in the system. The system includes nearly 20 pre-packaged reports and users can favorite reports, add them to a folder of preferred reports, and also can drill down for more information on reports. Users can create, download, and save ad hoc reports that can include nearly any field in the system and these ad hoc reports can include custom data columns, sorting, grouping, and charts and graphs. Reports can be set to run automatically and be sent to users via email on a regular basis. Report data can be displayed on dashboards across the system and users with the appropriate permissions can create their own personalized dashboards.

SECURITY, PERMISSIONS, & DATA ACCESS

- S **Overall Section Rating:** Standard
- S **Access Control:** Standard
- S **Audit Log:** Standard
- S **Login Security:** Standard
- B **Data Security:** Basic
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- B **Virus Protection:** Basic
- S **Backup and Recovery:** Standard

Administrators have granular control to grant, limit, or restrict user access to a wide variety of system functions. The system includes password complexity rules and logs users out after a specified time of inactivity. Administrators can enable two-factor authentication for access to the administrative side of the system, and the system can also integrate with Single Sign On. Salesforce also offers an authentication app for mobile devices to provide additional security. The system retains full audit info for two years. All data stored within the database can be extracted by a system administrator.

The vendor has experience integrating with a variety of platforms and tools and clients can extend system functionality either through the Salesforce AppExchange, configuring their own Lightning Apps, or by developing a custom integration using specialized software or an API.

USER EXPERIENCE

- S **Overall Section Rating:** Standard

The interface for the system is polished looking and will feel familiar to Salesforce users. Buttons and links are easily distinguishable from text. It does require some comfort with Salesforce, and casual users may find it daunting to navigate at first, but expert users can quickly find what they need and set sections up fairly easily. While the system works with screen readers for the visually impaired, it has not yet undergone an accessibility assessment and some pages may not be optimized for screen readers. The system is designed responsively to display across a variety of devices and Salesforce provides a mobile app as well.

SUPPORT & TRAINING

- A **Overall Section Rating:** Advanced
- A **Technical Support:** Advanced
- A **Training:** Advanced

Amp Impact provides several levels of support: Lite, Standard, and Premier. Premier support covers configuration service, user and data monitoring support, "how to" coaching, analytics support, implementation training, new release configuration services, and more, while Lite Support includes bug fixes, access to user guides, and release updates. Amp Impact support is also supplemented by Salesforce support.

Formal training sessions and resources are provided to every client during implementation. Vera Solutions develops both written and video documentation and provides a combination of in-person and remote training to build system administration capacity, and to transfer knowledge and system ownership. At the start of each engagement, Vera works with the client to determine the appropriate training model (e.g., "Train-the-Trainer" workshops, direct end-user training) and plan.

Stability in the Market

Amp Impact has been in use since 2017. The vendor reports that the software package has 43 active clients, with nine of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 0

Blackbaud Grantmaking

https://www.blackbaud.com/solutions/grant-and-award-management/grantmaking

The 2018 launch announcement of Blackbaud Grantmaking signaled the next stage in the evolution of GIFTS Online, the grants management system Blackbaud had acquired from MicroEdge in 2014. Along with the relaunch and rebranding, the vendor has also developed new modules and integrations using its SKY open-source cloud platform. The core application currently in release still uses the GIFTS Online Microsoft Silverlight architecture, but a new portal for grantees and an outcomes reporting and tracking module are built with the new SKY UX framework. The vendor reports that it is working to update the core application to the SKY UX framework as well.

The core system provides a strong base for tracking and managing grants, organizations, contacts, and payments, with more than 200 standard reports built into the system and ad hoc reporting that can include virtually any field included in the system. Administrators can configure dashboards for each user that show assigned tasks and can include charts and tables that can be used to drill down for more information. A series of optional modules add features such as portals that allow foundations to collect progress reports and application reviews online; tools to create and manage numerous custom fields and forms and manage and track budgets; and a tool to facilitate outcomes collection and reporting. These modules increase the base subscription cost.

The vendor offers tiered pricing for the system based on the number of users and modules—an entry-level client could acquire Blackbaud Grantmaking for about $3,900 per year, while a very large foundation with numerous users and using many modules could expect to pay around $42,000 per year. Subscription fees do not include implementation costs.

Small Org, First Year: N/A

Small Org, Annual Recurring: Starts at $3,900

Large Org, First Year: N/A

Large Org, Annual Recurring: $42,000

GRANT, CONTACT & ORGANIZATION RECORDS

- A **Overall Section Rating:** Advanced
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- A **Demographic Data Collection:** Advanced
- A **Task Management:** Advanced
- A **501(c)(3) Status:** Advanced
- A **Currency Handling:** Advanced

Blackbaud Grantmaking provides solid support for tracking grants, organizations, and contacts throughout the entire lifecycle. All information is linked so that users can view related records and data across records, and grants can be tracked by program cycle, board meeting date, or categories. Organization records are separate from grant records so that you can see grant history and multiple contacts can be associated with an organization. The system records all system-generated correspondence and users can log other communications and activities as well. Blackbaud does offer plugins for Outlook and Gmail that allow users to capture emails from those external email systems into organization and grant records.

During implementation, a foundation can create a hierarchical base taxonomy to control and define classification and coding that can be maintained and updated by administrators. Administrators can customize field names and define dropdown values for fields in the database. In addition, with the optional Blueprint module, administrators can create up to 1,000 custom fields per record type to capture additional data, such as demographic data for organizations, projects, and programs, and organize them into sections so that information is easy to find on screen

Users can run status checks against the IRS nonprofit database individually or in batch with a subscription to Blackbaud's Tax Information Service. The system also supports multi-currency handling, allowing foundations to make payments in different currencies and report in dollars. Exchange rates are adjusted manually and an administrator can choose to update the exchange rate for previously awarded grants when a change is made or apply it only to new grants.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- A **Online Applications:** Advanced
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- B **Account Creation/Login:** Basic
- A **Autopopulation:** Advanced
- A **Branching:** Advanced
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- S **Multilingual Content:** Basic

Applicants can create a profile (or log into an existing profile) and complete an online application. When the application is submitted, an administrator reviews the application and moves those that are eligible for consideration into the core system.

The system allows applicants to create a new account even if there is one already in the system but notifies administrators of potential duplicates based on contact name or organization name. Applicants can auto-populate organization information in an application via an integration with GuideStar and the system can pre-load information from previous applications into the application form. The module allows for eligibility quizzes that include a branching mechanism that can direct an applicant to multiple applications, as well as branching logic within application forms. Administrators can create as many application forms as they would like, configure applications, and control logos, colors, and fonts on the portal. Data entered into the application is auto-saved as the applicant moves from tab to tab.

Applicants can choose to share applications through the portal with other individuals in their organizations and with individuals at other organizations, but this permission is view-only and only one person (the application "owner") is able to make edits to the application.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- B **Reviewer Access:** Basic
- S **Review Workflow:** Standard

The application review functions in the core system support the assignment of applications to reviewers or committees, the creation of different information or scoring schemes for programs, as well as the ability to define multiple workflows for grants review processes. An automated email notifies reviewers when they have an application assigned to them. Administrators can see numeric scores from individual reviews and the system will aggregate the scores to report an average score.

An optional Reviewer module provides reviewer portal functionality for external reviewers to submit online reviews. This module enables discussions so that reviewers can see comments and questions from other reviewers (but at this time cannot see other reviewers' scores). Administrators can also provide reviewers with information about an organization's request history by running an organization report and sharing the results as a document in the portal.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- S **Sending Email:** Standard
- S **Automated Emails:** Standard
- S **Templates:** Standard
- A **Letters:** Advanced
- S **Board Materials:** Standard

Blackbaud Grantmaking's core system allows users to send emails to individuals and groups through the system that include both standard text and merge data and attach documents to those emails. Email performance metrics such as deliveries, opens, and clickthroughs are not available. Email, letter, and document templates that include both standard text and merge data can be created and maintained in the system, but at this time the functionality only works in Windows operating environments. If a foundation has the optional Reviewer module it can leverage that portal functionality to share documents with board members or the system can connect with third-party board portal software via an API.

PAYMENTS & BUDGETING

- A **Overall Section Rating:** Advanced
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

Payment scheduling and tracking is available in the core system, allowing users to define a default payment schedule for all grants that can be adjusted individually or to create a payment schedule on a grant-by-grant basis. Payments can be made contingent on the completion of a grant requirement, such as the submission of a grant report, and the system will not trigger payment until the report is submitted. Payments can be exported to accounting/finance as a .csv—the system will mark the record as paid on export and foundations can use the system's API to import payment details from accounting/finance into the system. In addition, Blackbaud provides integrations with several accounting systems via its optional Accounts Payable module.

The optional Budget module provides the ability to define programmatic budgets and track what has been paid, committed, and available. Administrators can set up hierarchical budgets, use previous budgets as a base and adjust them for the current year, and split payments across more than one program so that they can roll up to the appropriate budgets. The module also provides the ability to create different dashboards for budget forecasts and to predict cash flow needs.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- S **Progress Reports:** Standard
- A **Evaluation:** Advanced

The system allows foundations to define grant requirements, either as a default for all grant opportunities, by program, or by individual grant opportunities, and track which requirements grantees have met. Grantees will receive automatic reminders based on requirement due dates.

The optional Online Applications and Requirements module allows foundations to collect grantee progress reports through online forms and move them into the core system. These forms can collect both qualitative and quantitative information that can be used in reports. An optional Outcomes module allows for more in-depth collection and tracking of outcomes metrics. This module allows foundations to define specific outcomes that tie back to overall program goals and surface them to an applicant during the application process so that the applicant can select and define which metrics apply to their grant. A taxonomy based on the U.N. Sustainable Development Goals is built into the Outcomes module. The outcomes reporting is accessed in the module rather than via the report manager, and allows users to track progress toward goals for each grant and to summarize this data at the programmatic level.

SYSTEM QUERYING & REPORTING

- A **Overall Section Rating:** Advanced
- A **Search:** Advanced
- A **Pre-packaged Reports:** Advanced
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

A global search bar at the top of each page allows users to search within core system modules or across all modules, including the ability to search documents uploaded to the system. Blackbaud Grantmaking includes more than 200 standard reports with the system in the reports manager and users can mark their favorite reports so that they can easily be found. While standard reports are not editable by users, ad hoc reporting allows users to generate reports using virtually any field included in the system. Reports can be scheduled to run at a specified time with the results sent to users. Administrators can configure dashboards for each user that include charts and tables that allow the user to drill down for more information.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

S **Access Control:** Standard

S **Audit Log:** Standard

S **Login Security:** Standard

A **Data Security:** Advanced

S **Data Exports:** Standard

S **Integrations:** Standard

S **Virus Protection:** Standard

S **Backup and Recovery:** Standard

Administrators are able to grant, limit, or restrict user access to a wide variety of system functions and these permissions can be configured during implementation. An audit log records system access, actions, and changes. Login security is managed through system-enforced password complexity rules and can be integrated with Single Sign On. Users are automatically logged out from the system after a specified time period of inactivity.

The system data resides on a private cloud server. While all system data can be extracted, an administrator needs to work with Blackbaud's consulting team to do the full extraction. Blackbaud has experience integrating with numerous third-party software providers and also provides open REST APIs to allow clients to extend system functionality.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The system interface is polished and neatly laid out. The modules for which the user has access are laid out in tabs across the top of the screen when the user logs into their dashboard, but navigation moves to the left column when the user is in a record. Some modules, such as Online Applications and Requirements and Outcomes, have a different look and feel from the main system and do not appear in the tabs on the dashboard. Administrators can see and control dashboards for all users and have the ability to create a simplified dashboard for casual users, such as executive leadership.

The current version of the core Blackbaud Grantmaking application is built in Microsoft Silverlight, which requires users to have Silverlight installed on their workstation. The document management features in the system (Document Template Manager and Document Check In/Check Out) require a Windows operating system and are compatible only with Internet Explorer. The Silverlight framework also prevents compatibility with some assistive technologies. The vendor reports that it is updating the core application so that it is built in Blackbaud's open source SKY UX user experience framework, which provides better support for assistive technologies. The vendor reports that the grantee and reviewer portals in the current system are being rebuilt using the SKY UX framework, which provides responsive design and better compliance with accessibility guidelines. Customers who subscribe to the Outcomes module currently are able to offer an enhanced grantee portal experience. Blackbaud does offer an app for mobile devices, which is available in app stores as "GIFTS Online Mobile."

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

Video training for users via Blackbaud University is included in the subscription price for the system and Blackbaud will work with customers to provide customized onsite training at an additional price. Technical support for clients is available online and via telephone and email, with enhanced support packages available. Blackbaud will also provide technical support to a client's applicants as part of a managed services offering (which is available at an additional fee).

Stability in the Market

The current iteration of Blackbaud Grantmaking (formerly GIFTS Online) has been in use since 2009. The vendor does not disclose client counts.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 94

Percent of survey respondents who would recommend the system: 44.7 percent

Training Score: 0.75

Implementation Score: 0.82

Support Score: 0.46

CC Grant Tracker

https://cctechnology.com/cc-grant-tracker/

CC Grant Tracker by CC Technology is a cloud-based full-featured grants management system with a heavy focus on research grants, but the ability to track and evaluate a wide range of grant programs. In addition to solid grant tracking and relationship management abilities, the system provides advanced functionality for application reviews and outcomes tracking. The Glasgow-based company became part of Digital Science in late 2018 and has more than 50 active clients, most of which are located in the United Kingdom and Europe. This international focus means that the system provides strong multi-currency support.

Some of the advanced review functions include the ability for reviewers to see summaries of submitted applications and self-identify as interested in reviewing an application, algorithm-based auto-assignment of applications to reviewers that takes into consideration review workload and expertise, and the ability to facilitate live review panel or board meetings. CC Grant Tracker supports monitoring of outputs, outcomes, and impact for grants and projects using results frameworks or log frames. In addition to the outcomes dashboards, each project has a “Lessons Learned” section that allows users to capture project experiences and record learnings that can be applied to future projects.

The system facilitates multi-organization collaboration on applications, both by allowing applicants to define external participants and control their access to different parts of the application and by enabling multi-partner projects that provide a parent/subgrant relationship in which progress is tracked at the parent level and finances are tracked at the subgrant level. Finally, CC Grant Tracker includes a risk register that allows users to define and track risks in a variety of categories at the project/grant level and also at the program level. The system allows users to view a consolidated view of risks across all grants.

Pricing is related to system usage. The vendor works with clients to develop agreed-upon metrics related to client business type, scale, and usage needs that are reflective of the client’s proposed system usage. A first-year implementation fee covers the cost of system set up and training and yearly fees cover licensing, hosting, and support.

Small Org, First Year: $30,000 and up.
Small Org, Annual Recurring: $15,000 and up.
Large Org, First Year: $90,000 and up.
Large Org, Annual Recurring: $45,000 and up.

GRANT, CONTACT & ORGANIZATION RECORDS

S **Overall Section Rating:** Standard
S **Grant Tracking:** Standard
S **Organization Records:** Standard
S **Contact Records:** Standard
A **Relationship Management:** Advanced
S **Record Updates:** Standard
S **Field Customization:** Standard
S **Custom Fields:** Standard
A **Attachments:** Advanced
B **Categorization:** Basic
S **Demographic Data Collection:** Standard
A **Task Management:** Advanced
501(c)(3) Status: N/A
A **Currency Handling:** Advanced

CC Grant Tracker provides good support for tracking grants, organizations, and contacts. Users can track grants by program cycle, board meeting date, and category, as well as by percentage or dollar allocation across programs. A timeline of milestones displays at the top of each grant with estimated and actual completion dates included. Organizations and contacts are tracked separately from grants so that users can see the history of all grants to an organization with links to related records. All system-generated emails and letters are attached to the associated contact record and grant record. Emails sent from outside the system can be sent to the system and either manually attached to a grant record by an administrator or automatically attached if the sender puts the grant reference number at the start of the subject line. The system's journal feature allows users to log activities such as phone calls and site visits on a record and also allows attachments.

Administrators can customize names and define dropdown values for fields used in the administrative interface, such as program or grant codes, and can create a virtually unlimited amount of custom fields to store internal tracking codes, demographic data, or information submitted by grantees. Custom fields can be organized into sections, tabs, and/or pages. Demographic data collection can be collected for organizations, projects, and programs. Administrators can also define custom categorization codes for tracking and reporting. Users can manually assign tasks to others in the system and tasks can be assigned through workflow as well. Assigned tasks appear on a user's dashboard.

The system does not offer the ability to look up organization records and tax status in a 501(c)(3) database. The system does support giving in multiple currencies—grant applicants can apply for funds in their own currency and the system holds the exchange rate using a client's Bloomberg feed. Exchange rates can be snapshot at the time a grant is awarded or can be set to use the current live rate.

GRANT APPLICATIONS

S **Overall Section Rating:** Standard
S **Online Applications:** Standard
A **Collaboration:** Advanced
S **File Uploads:** Standard
S **Account Creation/Login:** Standard
S **Autopopulation:** Standard
S **Branching:** Standard
S **Customization - Appearance:** Standard
S **Customization - Fields:** Standard
S **Multilingual Content:** Standard

The system provides a single portal that provides access for applicants, grantees, and reviewers. The portal can be branded with an organization's logo and colors. When a new applicant creates a profile, the system checks the email address against the database and prompts the user if the address already exists. Foundations can include an eligibility quiz for applicants, but it cannot branch to multiple applications. It is possible to create a portal offering multilingual content, but the vendor reports it would require custom development.

Application forms are created using a drag-and-drop interface and can feature a wide variety of field types. An administrator can also copy fields and pages from previous applications into new forms. Application forms can include branching logic and administrators can create help text for fields. Data entered into an application is saved as an applicant migrates from page to page. In addition to asking applicants to enter budgets via the online form, administrators have the option of providing an Excel and/or PDF template for an applicant to download, complete, and upload that parses the data into the corresponding system fields. Applicants can also upload attachments that can be previewed in the system by users and downloaded. The vendor reports that it has completed a proof of concept that would allow an applicant to fill out an offline form for a simple application that can be uploaded and parsed into the corresponding fields, but this is not yet included as core system functionality. The vendor also reports that integration with a third-party electronic signature tool is on its 2020 roadmap.

The system facilitates multi-organization collaboration on applications, both by allowing applicants to define external participants and control their access to different parts of the application and by enabling multi-partner projects that provides a parent/subgrant relationship in which progress is tracked at the parent level and finances are tracked at the subgrant level. Applicants also have the ability to view a full audit log of changes to their application.

APPLICATION REVIEW

- A **Overall Section Rating:** Advanced
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- A **Review Workflow:** Advanced

CC Grant Tracker provides advanced functionality in the area of application reviews. Each grant program can have its own review process and scoring scheme and administrators have the ability to create a wide variety of different types of questions or scoring.

As with applicants, reviewers can access applications assigned to them through the portal. Items for review are displayed as links to PDFs of the application form that the reviewer can view onscreen or download as a package. Administrators can choose to include a full history of the applicant's requests and grant awards on the PDF. Reviewers can self-identify as interested in reviewing an application via the "Request and Conflict" function, which provides reviewers with a list of applications in the pool, links to application summaries, and the ability to indicate if they have a conflict of interest or an interest in reviewing. The system also allows for an algorithm-based auto-assignment of applications to reviewers that takes into consideration review workload and expertise.

The "Live Meeting" functionality in the system is set up to facilitate panel or board meetings. This can allow reviewers to see comments and scores on applications and can allow administrators to create and distribute board dockets, record attendance linked to the meeting, and share meeting agendas.

COMMUNICATIONS

- A **Overall Section Rating:** Advanced
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- S **Board Materials:** Standard

Users can send emails and attachments to individuals and groups through the system or the system can be set up so that these emails are sent through the grantmaker's server. The system includes standard email and letter templates and also the ability to create custom email, letter, and document templates that can include both standard text and merge data, as well as attached files. System-generated letters can be viewed and personalized before being printed. In addition to providing board portal access and allowing the creation and distribution of board dockets, clients can also integrate with third-party board portal solutions using CC Grant Tracker's API.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- S **Payment Types:** Standard
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

CC Grant Tracker provides robust payment and budget tracking for clients. An administrator can define a payment schedule that applies to all grants with the ability for users to adjust the amounts and dates for each grant or users can define a payment schedule on a grant-by-grant basis. Payments can be made contingent on a specified grant requirement and users can see upcoming scheduled payments and whether the grantee has met requirements linked with that payment. The system supports an automated payment approval process with configurable workflow steps as well as batch payment creation and batch updates of payment details.

Payment data can be exported to finance systems or CC Grant Tracker can integrate with accounting software. Payment approval creates a transaction in the system that can then be pushed to the finance system; once the payment is processed, the confirmation file can be sent back, payment details added to the record, and the transaction marked as complete. The system can capture banking information from a grantee to support wire transfers. While the system does not include in-kind payments as a payment type, the vendor reports that there are a couple different system workarounds that can support these kind of transactions.

Grants can be split across more than one program for budgeting purposes. Users can pull reports on payments and budgets that carry coding attributes of associated requests, organizations, and contacts and track budgets in a variety of ways: by the amount available, awarded, or paid in a particular year; or in hierarchically defined categories or program areas. It is possible to use previous years' budgets as a base and adjust them for the current year and to use scheduled payment data to predict cash flow needs for a specified time period.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

The system provides a great deal of functionality in the area of grantee reporting and outcomes evaluation. Administrators have the ability to define a default set of grant requirements for all grant opportunities or define grant requirements by program or individual grant opportunity. Grantees can see required reports and their due dates on the portal and the system will also trigger automated emails prior to and after a report is due. Administrators can easily create both narrative and financial report forms and financial report forms can also include budget details entered into the grant application.

CC Grant Tracker supports impact measurement by allowing a foundation to define results frameworks or log frames at a grant, program, and organizational level. An administrator defines outcomes and impacts for programs and grants in the system and an applicant can select metrics from those defined elements during the application process. Grantees can then report on the progress toward those outcomes and that data is used to automatically calculate progress toward the grant outcomes and also can be aggregated on a project level and across a portfolio of projects. Each program in the system has a results-monitoring dashboard that displays the program's metrics. The system also enables the capture and reporting of data along demographic and economic categories.

In addition to the outcomes dashboards, each project has a "Lessons Learned" section that allows users to capture project experiences and record learnings that can be applied to future projects.

SYSTEM QUERYING & REPORTING

- S **Overall Section Rating:** Standard
- A **Search:** Advanced
- S **Pre-packaged Reports:** Standard
- S **Customizing Reports:** Standard
- B **Report Dashboards:** Basic
- S **Ad Hoc Reports:** Standard

Users have the ability to search for grants and applications by a number of criteria and view pre-packaged reports based on this filtered set of criteria. These search criteria can be saved as a filter and administrators can share these saved filters with others in the system if they wish. The system also offers a universal search that can retrieve results from all fields in the system as well as search the content of uploaded documents.

The system has a range of standard reports and users can use the report builder to create ad hoc reports that can include nearly any field in the system. Ad hoc reports can include custom data columns, datasets, sorting, grouping, logos, and headers, but data needs to be exported to Excel or a business intelligence/ data visualization tool to create charts and graphs. Administrators can schedule data exports to occur at certain times. The system offers a variety of standard dashboards that can be filtered by certain criteria, but adding data and visualizations from ad hoc reports to grant program dashboards would require customization and/or integration work.

SECURITY, PERMISSIONS, & DATA ACCESS

- A **Overall Section Rating:** Advanced
- A **Access Control:** Advanced
- S **Audit Log:** Standard
- A **Login Security:** Advanced
- A **Data Security:** Advanced
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- S **Virus Protection:** Standard
- S **Backup and Recovery:** Standard

Access control for the system can be very granular, with administrators able to define user permissions at the field level. Administrators can export all data stored within the system and can control access to export fields. Additionally, individual search fields can be restricted by permissions so that different people have different levels of access.

Login security is facilitated by system-enforced password complexity rules and automatic logout after a specified time period of inactivity. The vendor can integrate with services such as Azure AD, OKTA, and G-Suite to provide two-factor authentication and can enable Single Sign On. In addition, the vendor offers access to an API to allow clients to extend system functionality with other third-party tools.

All data resides on a virtual private server for each client instance and data is encrypted all the way from the browser to the end system. There is a virus scan for all files uploaded to the system.

USER EXPERIENCE

S **Overall Section Rating:** Standard

CC Grant Tracker offers a polished, neatly laid out interface. Modules run across the top of the screen in the administrative interface, with contextual navigation in the left column. Action buttons are clearly labeled. The system does include extensive submenu options in the contextual menus, which may mean that casual users of the system would need to spend more time looking for the action they want to take; however, administrators can control the menu items and actions certain users are able to see in the system and can mitigate this somewhat.

The top of grant records includes a timeline of key grant events, which provides users with the ability to determine the status of grant activities without having to run a report, look through fields, or read through text. Some terminology in the system is technical (e.g. use of the word "control" instead of "field" in the form designer) and some terms are more familiar to individuals and organizations in the research sector but the system does include detailed contextual help in many instances and the vendor reports that issues related to terminology differences are usually resolved quickly during initial system training.

Applicants, grantees, and reviewers often have to click a button to validate their responses before being able to submit a form instead of having the system validate responses automatically on submission. The system is designed responsively to display across a variety of devices and does not offer a mobile app.

While the system currently is not fully accessible to users with disabilities, the vendor reports that it is working to meet WCAG 2.1 AA/Section 508 standards throughout the product and expects to have compliance by 2021.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

The vendor provides technical support to clients online and via telephone and email. The vendor's support contract also includes an option to provide technical assistance to applicants, grantees and reviewers using the portal. The vendor provides full training to clients either via video conferencing or in person at launch as part of implementation and also on an ongoing basis as needed, subject to an additional fee.

Stability in the Market

CC Grant Tracker has been in use since 2006. The vendor reports that the software package has 51 active clients, with the majority of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 24

Percent of survey respondents who would recommend the system: 93.8 percent

Training Score: 0.89

Implementation Score: 0.90

Support Score: 0.81

CyberGrants is an easy-to-use, highly-configurable system that provides a solid set of tools for managing the full grant lifecycle. The system provides good insight into the organizations in a foundation's database, with the ability to capture a wide range of data in custom fields and regular automated scans against 501(c)(3) databases and watchlists and notification of status changes.

The system provides the ability to create as many workflows as a foundation needs, ranging from simple to complex. Applicants and grantees can choose the preferred language for their portal experience from a selection of 14 languages. If an applicant or grantee submits the wrong application or progress report form on the portal, the administrator has the ability to convert it to the correct form, retaining completed answers for the same questions, and return it to the individual for completion.

In addition to an easy-to-navigate interface, the system includes an intuitive report builder that can be used by non-experts. Administrators can also create role-based tabs that contain information relevant to different types of users. The vendor offers a variety of pre-built integrations to third-party platforms and tools and can also custom develop extended functionality that is not available via configuration.

Yearly pricing is based on the number of individuals with access to the system and their level of access. Full licenses provide access to all system functionality, whereas limited licenses provide access to all modules except the reporting suite. When determining the number of licenses needed for the system, a foundation needs to take into account their application reviewers, who require at least a limited license to be able to log in. The vendor declined to provide specific pricing for the system.

Small Org, First Year: The vendor declined to provide specific pricing for the system.

Small Org, Annual Recurring: The vendor declined to provide specific pricing for the system.

Large Org, First Year: The vendor declined to provide specific pricing for the system.

Large Org, Annual Recurring: The vendor declined to provide specific pricing for the system.

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- B **Organization Records:** Basic
- S **Contact Records:** Standard
- S **Relationship Management:** Standard
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- B **Attachments:** Basic
- A **Categorization:** Advanced
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- A **501(c)(3) Status:** Advanced
- S **Currency Handling:** Standard

CyberGrants provides solid tracking of grants, organizations, and contacts. Organization and contact records are separate from grant records, so that foundations can see a history of their relationship. Multiple contacts can be associated with an organization, contacts can be associated with more than one organization, and it is possible to send communications to contacts based on their role at the organization. At this time, it is not possible to track individual business units within an organization, but the vendor reports that they are working on adding parent/child organizational hierarchy. All system-generated interactions are saved on records and vendor configuration of the system can make it possible to log additional communications, such as phone calls and site visits, and link to an external contact management system. Records also have a collaboration cc: address that allows a user to save emails sent from outside the system.

Attachments can be uploaded to records, but the software does not allow users to preview the contents within the system; the files need to be downloaded to be viewed. Administrators have the ability to specify the names of fields displayed in the interface, define dropdown values for fields, and add custom fields to organization and contact records that can be grouped in sections or tabs (although the vendor says that collecting certain types of data in fields might require customization). Fields can be used to collect demographic data for organizations, projects, and programs.

Administrators can assign tasks to system users manually, or they can be assigned through workflow, and assigned tasks show up on a user's dashboard. The system includes robust functionality to check organizations' 501(c)(3) status. The system uses tax ID numbers to scan all organizations against IRS and other international nonprofit registry lists on a nightly basis and CyberGrants notifies their clients if one of the organizations in their database drops off the 501(c)(3) list. In addition, every organization entered into the platform is run against more than 75 watchlists. Tax status and watchlists can also be scanned manually.

GRANT APPLICATIONS

- A **Overall Section Rating:** Advanced
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- S **Autopopulation:** Standard
- A **Branching:** Advanced
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- A **Multilingual Content:** Advanced

The system provides an applicant portal that also serves as a grantee portal for organizations that receive an award. The portal can be customized with a logo and includes support for 14 languages, and the applicant/grantee can choose the language of their portal experience. The administrative interface is only available in English, but the system will store applicant/grantee responses in the language used. New applicants can create an account and the system will check their email against the database and prompt the user to recover their password if it already exists and will also check to see if their organization is already in the system—if it is, it will prompt the user to log in with organization credentials, which are based on tax ID number . The portal can include an eligibility quiz that can branch to multiple applications.

Contacts already in the system are presented with a dashboard when they log in that includes applications in process, submitted applications, and pending requirements with due dates. The applicant has the option to use contact information from a previous application on a new form, but new applicants are not able to auto-populate applications forms with organization contact information by entering the organization's tax ID. Applications can include branching logic and use a wide variety of field types. The system has a pre-built integration with an electronic signature platform. Contacts associated with the same organization can collaborate on an application and contacts from outside organizations can be associated with another organization to facilitate partnership applications. Administrators also have the ability to perform actions on behalf of a grantee, such as inputting a paper application into the system, and can change the proposal type if an applicant fills out the wrong form—the system will carry over completed answers for questions that are the same and return the application to the applicant.

APPLICATION REVIEW

- A **Overall Section Rating:** Advanced
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- A **Review Workflow:** Advanced

The system includes strong support for a variety of review structures and workflows but does not offer a separate reviewer portal. Reviewers log in to the administrative interface of the system, with role-based access providing simplified views. Reviewers can be provided additional system permissions, which would increase the number of options they see on their interface.

Administrators can configure as many workflows as they need and layer in different levels of logic (e.g. to segment applications by grant size), and reviewers receive automatic notification when they are assigned an application. Vendor configuration of the system can provide foundations with the option of allowing reviewers to see comments and scores from other reviewers and with the ability to randomly assign reviewers to applications based on workflows or other characteristics.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- **Board Materials:** N/A

Users can send emails and attached files to individuals and groups through the system and can set up and send automated emails based on certain events. Administrators have the ability to see some email delivery metrics. Email and letter templates can include both standard text and merge data, plus attached files. Letters can be printed individually or as a batch and can be downloaded and personalized before sending. The system does not support the creation of board dockets at this time.

PAYMENTS & BUDGETING

- A **Overall Section Rating:** Advanced
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

The system allows administrators either to define a default payment schedule to all grants and adjust dates and amounts individually or define a payment schedule on a grant-by-grant basis. Grantees can view the payment schedule for their award on the portal. Payments can be made contingent on the completion of a specified grant requirement. Users can see upcoming scheduled payments and whether or not a grantee has met the requirements linked with that payment and can void payments and place payments on hold. The system also supports an automated payment approval process with configurable workflow steps.

Payments can be exported to accounting and users can import payment details or the vendor can integrate the system with accounts payable software. Integrations are also possible using the system's bi-directional API. The vendor also reports that they can disburse payments on behalf of clients. Payment records can include notes, organization records can store bank and wire transfer information, and the system provides the ability to track quid pro quo and in kind grants.

Users can track budgets by a variety of criteria and look at allocated, unallocated, committed, and paid amounts. Grants can be split across more than one program for budgeting purposes. Budgets can be defined hierarchically and administrators can specify which users are authorized to schedule payments against a specific budget line item. The system allows users to use previous years' budgets as a base and adjust them for the current year, as well as look at budget data for the current year or future years.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- S **Overall Section Rating:** Standard
- S **Requirements Tracking:** Standard
- A **Progress Reports:** Advanced
- S **Evaluation:** Standard

The vendor can configure the system to allow administrators to define a default set of grant requirements either for all grant opportunities or by program or individual grant opportunity. Grantees can track grant requirements and deadlines on the portal, but configuration is required to allow foundation users to track which requirements grantees have met. Grantees can submit progress reports online and, as with grant applications, an administrator can change the proposal type if a grantee fills out the wrong form and return it to the grantee. The system automatically calculates progress toward grantee or program outcome goals using submitted progress reports. This outcome data can be aggregated and reported on across programs or for all grants

SYSTEM QUERYING & REPORTING

- S **Overall Section Rating:** Standard
- S **Search:** Standard
- S **Pre-packaged Reports:** Standard
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

CyberGrants users can search for grants and applications by a number of criteria and view pre-packaged reports based on this filtered set of grants or can use the system's universal search to retrieve results from all data fields in the system (but not the contents of uploaded files). Set searches are available on the Main tab and users can add a search they create to the list or set it as the default screen on the Main tab.

The system includes a number of templated reports for users. Users cannot make changes to pre-packaged reports but can favorite reports and save ad hoc reports that they crate or modify, as well as schedule them to run and be sent to users. Ad hoc reports are created using a drag-and-drop interface and can include any data field from the system. Data in ad hoc reports can be tabbed, grouped, or organized into a matrix or pivot table and users can chose from a selection of calculation options for subtotals. Users are not able to add graphs or charts to reports, but the data can be exported to a business intelligence (BI) or data visualization tool for further manipulation. Users can personalize their dashboard and also integrate it with BI tools (such as Tableau) to provide visualizations.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

S **Access Control:** Standard

S **Audit Log:** Standard

A **Login Security:** Advanced

S **Data Security:** Standard

A **Data Exports:** Advanced

S **Integrations:** Standard

S **Virus Protection:** Standard

S **Backup and Recovery:** Standard

System access is governed both by license type and by administrator-managed permissions. Users with full licenses have access to all system functions, while users with limited licenses do not have access to the reporting suite. Administrators can set security levels or roles at the section level, with granular control over specific permissions. The system includes a built-in virus scan for all uploads and records changes and user actions in an audit log.

Login security can be controlled by password complexity requirements (which is a system configuration) or by Single Sign On or two-factor authentication (which would require vendor customization work). Users are automatically logged out after a specified time of inactivity, and both applicant and grantmaker can reset login credentials.

All client instances are housed on a shared server, but clients have the ability to turn different feature releases on or off. Administrators can download all their system data at any point in time. The vendor provides API access to data in the system and offers pre-built integrations with a number of platforms that have an open API.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The interface for CyberGrants is polished looking and neatly laid out. System modules are accessible from a bar at the top of the screen, with contextual menus in the left column. Links and buttons are clearly distinguishable from text. The system is designed responsively and displays across a variety of devices. At this time, it does not offer a mobile app, but the vendor reports that they are in the process of designing one. While the system is not fully Section 508-compliant, it is generally accessible to users with disabilities and works with screen readers.

Administrators can set up role-based tabs in the system that are visible based on a user's permission level. An executive tab can show the high-level health of programs, whereas grants administrator tabs can be more action-oriented and task-based. The report builder is extremely intuitive, allowing non-experts to easily create reports relevant to their needs.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

Technical support is included with license fees and can be based on service level agreements. The vendor can also provide technical support to applicants and grantees using the system Onboarding training is provided to new clients, and they have the opportunity to attend additional training webinars. Clients are also able to purchase extended training via webinar or onsite.

Stability in the Market

CyberGrants has been in use since 2001. The vendor reports that the software package has more than 400 active clients, with several of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 4

Percent of survey respondents who would recommend the system: 75 percent

Training Score: 0.83

Implementation Score: 1.0

Support Score: 0.84

First Akoya.net ▶▶▶ https://www.bromelkamp.com/products/first-akoya-net

First Akoya.net is a web-based grants management system from the Bromelkamp Company built on the Microsoft Dynamics platform. The system brings together the robust CRM functionality of Dynamics with solid grant tracking and management capabilities. An optional eGrant.net add-on extends the functionality of First Akoya.net to allow foundations to collect and review grant applications online and also to collect grantee progress reports online. First Akoya.net can also be configured to work with other online application software.

The system's deep integration with Office 365 allows clients to work with contacts, emails, appointments, and tasks set in either Outlook or First Akoya.net and have those changes appear in both systems. Letter and document templates take advantage of Microsoft Word's mail merge functionality and the merged documents can be customized and edited in the system. An Outcomes module allows an administrator to define outcome measures for a program and to roll up grantee-submitted metrics for program-level outcome reporting. A report wizard allows users to create, save, and share ad hoc reports either using a previous report as a base or from scratch. Report data and charts can be added to user dashboards as well.

Annual pricing for First Akoya.net is based on the number of users and their level of access to the system and can vary widely based on configuration—the general range is $600-$1,200 per user, per year based on access permission levels. Initial implementation costs are $6,350 for software and training, plus additional costs for data conversion and custom configuration (with these costs estimated in advance). The annual hosting costs for eGrant.net are $2,205 for the first grant type plus $150 per year for each additional grant type. Implementation fees are determined based on number of unique pages in the application set, plus some configuration to set the seamless data transfer into the First Akoya.net database. The pricing for eGrant.net reviewer hosting is the same as the pricing for the eGrant.net application hosting.

Small Org, First Year: $29,900
Small Org, Annual Recurring: $11,000
Large Org, First Year: $41,000
Large Org, Annual Recurring: $15,000

GRANT, CONTACT & ORGANIZATION RECORDS

- A **Overall Section Rating:** Advanced
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- A **Contact Records:** Advanced
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- S **501(c)(3) Status:** Standard
- S **Currency Handling:** Standard

Because First Akoya.net is created in Microsoft Dynamics 365, it provides strong customer relationship management functionality to complement its grant tracking abilities. Grants are tracked through their full lifecycle and can be tracked by program cycle or board meeting date, and by categories, as well as by percentage or dollar allocation across programs. Organizations and contacts are tracked separately from grants and a deep integration with Office 365 allows contacts, emails, appointments and tasks set in either Outlook or First Akoya.net to appear in both systems.

In addition to storing all system-generated letters and emails for each grant, once you connect an email in Outlook back to a request or opportunity, all replies go back to that record. It is also possible to associate contacts with their job function and tailor communications to go to the appropriate contact at an organization. Additional interactions such as phone calls, tasks, and site visits can be stored in the "Activities" section of a record, with the system holding a variety of different activities that each have distinct fields to capture related information.

Administrators have a great deal of control over the fields that store information in the database, and can specify the display names for fields, define dropdown values for fields such as program or grant codes, define custom categorization codes for tracking and reporting, and create a virtually unlimited number of custom fields that can be used to capture a wide variety of information, including demographic data for organizations, programs, and projects. Fields can be grouped on records to make it easy to find the information a user needs. Documents uploaded to records in the system are stored on clients' cloud storage—the vendor recommends that clients use Sharepoint for this purpose—and can be downloaded or viewed in the system.

The system has an integration with GuideStar Charity Check to allow clients to view an organization's 501(c)(3) status and automatically update the organization record with the results of that check. Administrators can schedule this check to run at certain times or intervals or can run it manually, but this is done on an individual basis rather than in batch. At this time the system does not bring in demographic data from GuideStar, but the vendor reports that this functionality is in development. The system also supports multiple currencies by allowing administrators to manually add and maintain exchange rates for selected currencies or integrate with a third-party solution to update exchange rates automatically. Each record will display currency amounts in the chosen currency for the record as well as the base currency amounts and exchange rate.

GRANT APPLICATIONS*

* Handled via eGrant.net

S **Overall Section Rating:** Standard

B **Online Applications:** Basic

B **Collaboration:** Basic

S **File Uploads:** Standard

S **Account Creation/Login:** Standard

S **Autopopulation:** Standard

A **Branching:** Advanced

B **Customization - Appearance:** Basic

S **Customization - Fields:** Standard

B **Multilingual Content:** Basic

For the purposes of this evaluation, we looked at how online applications are collected through the optional eGrant.net platform, although First Akoya.net can be configured to work with other online application software. The eGrant.net platform integrates directly with First Akoya.net, whereas other systems are connected via import/export of data. Out of the box, eGrant.net requires the vendor to create new grant types and applications (which is done for a nominal hourly fee) but an optional add-on allows administrators to add grant types and make changes to grant applications on their own.

When a new user creates a profile in eGrant.net, the system will check to see if the email address already exists in the database and will prompt the user to recover their password if it does. The login screen for the system can be customized with the foundation's logo, text, and colors. The system supports eligibility quizzes that can branch to multiple applications as well as branching logic within applications.

Grant applications will auto-populate with an applicant's contact information if it already exists in the system. While the system does not automatically bring in organization information when an applicant enters the organization's tax ID number, the vendor reports that it can work with the customer to implement this functionality for an additional cost. Information entered on an application is not auto-saved; applicants click the "next" button to save the data. The system allows applicants to choose whether to enter a budget using the online form or upload a budget that is attached to their application. The system also integrates with DocuSign and Adobe Sign for electronic signatures.

APPLICATION REVIEW*

* Handled via eGrant.net

S **Overall Section Rating:** Standard

S **Application Review:** Standard

A **Scoring/Rating:** Advanced

B **Reviewer Access:** Basic

S **Review Workflow:** Standard

For the purposes of this evaluation, we looked at how online applications reviews are collected through the optional eGrant.net platform. The reviewer portal provided by eGrant.net allows reviewers to log in, view and download applications that are assigned to them, and provide comments and ratings for each application. Reviewers receive automatic notification when applications are ready for review. The system allows administrators to set up different scoring schemes for different programs, define multiple workflows, and view/report on numeric scores. If an administrator allows it, reviewers can see scores from other reviewers as well. Because online reviews are conducted in a standalone system, it is not possible for administrators to assign additional permissions to reviewers within the core grants management system.

COMMUNICATIONS

- A **Overall Section Rating:** Advanced
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- B **Board Materials:** Basic

First Akoya.net provides robust communication tools. Users can send emails and attachments through the system to an individual or group or they can use Outlook to send emails that can be captured in the system. The vendor also offers pre-built integrations with MailChimp and Constant Contact for bulk email. Emails sent from the system can include both standard text and merge fields.

The system also facilitates automated emails that can be sent based on certain events and provides several standard letter and electronic templates that can be generated using information from grant records. Letter and document templates can be created using Microsoft Word mail merge functionality and can be customized and edited in the system. Templates can include attachments and workflow rules can automate these attachments.

The vendor reports that it sets up a board book layout as a custom report for most clients but the system does not provide any board portal functionality. Clients can use the system's API to integrate with third-party board portal software.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- B **Payment Schedules:** Basic
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

Payment schedules are set up on the individual grant level. The system supports a variety of payment schedules, including one-time, quarterly and multi-year payments. Payments can include notes and can be made conditional on the completion of a grant requirement. In order to automatically hold a payment if a requirement is not completed, an administrator needs to set up the requirement check as a business process flow for a payment. Administrators can add in a section to the payment field for in-kind and quid pro quo donations to track the item/service and fair market value. At this time grantees are not able to view their payment schedule online, but the vendor reports that this feature is in development. Approved payments can be exported to accounting/finance or, for an additional fee, the vendor can create a bridge to accounting systems like Quickbooks to allow for two-way data transfer.

Program budgets can be set up in the system to track the amount available, awarded, and paid out in a given year. Grants can be split across more than one program for budgeting purposes. These budgets can be hierarchical. Administrators can use previous years' budgets as a base and adjust them for the current year and can set up additional views to track budgets across multiple years.

GRANT REQUIREMENTS & OUTCOMES EVALUATION*

* Collected via eGrant.net

A **Overall Section Rating:** Advanced

A **Requirements Tracking:** Advanced

A **Progress Reports:** Advanced

A **Evaluation:** Advanced

Online progress reports are collected via eGrant.net. Progress report forms in the eGrant.net system need to be created by the vendor and incur a nominal hourly cost for development. Requirements can be set and tracked within First Akoya.net and the system can automate reminder emails in the lead up to requirement due dates.

First Akoya.net includes a module to track outcomes across programs. An administrator defines outcome measures for a program and during the application process applicants choose a measure (or measures) and provides their goals for that measure. When grantees submit a progress report online via eGrant.net, the data they enter for that outcome will be added to the system to allow a foundation to evaluate outcomes by program, by grantee, and for the foundation as a whole in a single year and over multiple years. The system can also accommodate the collection of qualitative data for outcomes, but this requires some additional configuration work by the vendor.

SYSTEM QUERYING & REPORTING

A **Overall Section Rating:** Advanced

S **Search:** Standard

A **Pre-packaged Reports:** Advanced

S **Customizing Reports:** Standard

A **Report Dashboards:** Advanced

S **Ad Hoc Reports:** Standard

Users can search for grants and applications in the system by a number of criteria and use that data to run pre-packaged reports. First Akoya.net includes a universal search that can return results from any record in the system but the search does not include the contents of uploaded documents. The system includes a variety of pre-packaged reports and users can create and save ad hoc reports either from a previous report or from scratch using the system's report wizard. Reports can include graphs and charts and can include custom data columns, datasets, sorting, grouping, logos, and headers. Report data and charts can be added to user dashboards as well. Reports can be set to run automatically via workflow.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

A **Access Control:** Advanced

S **Audit Log:** Standard

A **Login Security:** Advanced

S **Data Security:** Standard

A **Data Exports:** Advanced

S **Integrations:** Standard

Virus Protection: N/A

S **Backup and Recovery:** Standard

Administrators have a granular ability to grant, limit, or restrict user access to system information, extending down to the field level. Login security is facilitated by system-enforced password complexity rules and automatic log out after a specified time of inactivity. Single Sign On (SSO) is available for First Akoya.net via Office 365, and this includes the ability to enable two-factor authentication. SSO is not available for eGrant.net. Clients have the option to store their data on a virtual private server or a dedicated physical server. All system data can be exported by an administrator. The vendor does provide a number of pre-built integrations to third-party tools and also offers an API to allow clients to extend system functionality with additional integrations. At this time, the system does not offer end-to-end encryption or a virus scan for file uploads, but the vendor reports that both are in development.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The interface for First Akoya.net is polished-looking and neatly laid out, and similar in style to Microsoft Office 365. Section menus are accessible from the grid icon in the top left of the screen and a contextual action toolbar appears under the header. The system includes a lot of fields and options once a user gets down into individual records and actions, which can be confusing for casual users, but administrators can limit the amount of options these users can see using system permissions. Administrators can also set up process dashboards for grants managers to help simplify their experience as well. First Akoya.net is accessible via mobile app on tablets and mobile phones. eGrant.net is responsively designed to display across a variety of devices. The vendor reports that both software options have some accessibility features for users with disabilities.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

First Akoya.net clients can access technical support online and via email or telephone and the vendor provides support to clients for their grantees. Implementation includes two days of initial training delivered in-person or via the web. Additional training is available through free educational webinars, paid educational webinars, Bromelkamp Academy, and through customized training available for a fee.

Stability in the Market

First Akoya.net has been in use since 2011. The vendor reports that First Akoya.net has 65 active clients, 26 of which are private or family foundation clients, and eGrant.net has 61 active clients, 18 of which are private or family foundation clients. Bromelkamp Company LLC also provides similar grants management solutions for community foundations and corporate giving.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 15

Percent of survey respondents who would recommend the system: 93.3 percent

Training Score: 0.99

Implementation Score: 0.86

Support Score: 0.76

Fluxx Grantmaker

https://www.fluxx.io/

Over the past decade, Fluxx Grantmaker has continued to evolve from an open source solution into a sophisticated, full-featured grants management system. Users can choose to view system data in a table view or a series of unique, customizable, card-based dashboard interfaces that feel similar to Kanban board-style project management tools. In the card-based interface, cards are marked with icons representing the type of data they contain (e.g. contacts, grant requests, payments, etc.) and can include everything from individual records to graphs and charts drawn from system reports. Records on the cards include links to related data across the system and a quick search function for contents within the card. While the system is easy to use, with a considerable amount of drag-and-drop functionality, the dashboards need to be set up thoughtfully to allow users to find the data they need with a minimum of horizontal scrolling. A series of dashboard templates available in the system can help in that endeavor.

The system provides strong support for just about every function of grantmaking, including applications to review; communications; payment; reporting; and evaluation. Core system functionality is extended with a series of pre-built integrations with third-party systems, including a GuideStar integration that allows applicants to pull organization information into applications by entering their tax identification number. While the GuideStar integration is included in the base price of the system, some of these integrations can increase the yearly cost. In 2018, Fluxx launched Grantseeker, a free platform that allows nonprofits to manage their applications and grants and allows them to authenticate into multiple grantee portals for Fluxx clients.

Fluxx Grantmaker divides pricing into two tiers, based on the complexity of implementation. For a small organization, pricing starts at $15,000 annual recurring and $15,000 one-time implementation fee. For a midsize or larger organization, pricing starts at $25,000 annual recurring and $25,000 one-time implementation fee. Extra features, advanced workflows and third-party integrations are available at an additional cost. All pricing includes an unlimited number of users and data volume.

Small Org, First Year: Starts at $30,000

Small Org, Annual Recurring: Starts at $15,000

Large Org, First Year: Starts at $50,000

Large Org, Annual Recurring: Starts at $25,000

GRANT, CONTACT & ORGANIZATION RECORDS

- A **Overall Section Rating:** Advanced
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- S **501(c)(3) Status:** Standard
- A **Currency Handling:** Advanced

Fluxx Grantmaker allows foundations to collect, track, and report on a wide variety of data about organizations and grants. Administrators have the option to add an unlimited number of custom fields to the system. While the system does not include a pre-loaded philanthropic sector-based taxonomy for tagging and categorizing content, the vendor reports that clients have the ability to build any type of taxonomy into the system and that it will be adding pre-loaded taxonomies in 2020.

All system-generated communications are stored on grant and organization records and Fluxx also offers an Outlook integration that allows you to save any email sent or received in Outlook (including attachments) to an organization record, grant request, or payment record. Fluxx Grantmaker also integrates with GuideStar to pull tax status and organizational information into the grants management system, but at this time the software cannot bring in demographic information from the database. The vendor reports they are continuing to work with Candid on future enhancements to this integration. While there is not currently the ability to run batch updates of GuideStar Charity Check, the vendor reports this can be set to run automatically as a grant and/or payment moves through workflow.

The system supports grants made in multiple currencies. Each grant and payment record can store the amount in both local and base currencies. By default, currency exchange rates are pulled and updated from the European Central Bank on a daily basis and the vendor reports that clients can link to another exchange rate source through API as desired. Currency rates can also be updated on a grant-by-grant basis if necessary.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- B **Account Creation/Login:** Basic
- A **Autopopulation:** Advanced
- A **Branching:** Advanced
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- B **Multilingual Content:** Basic

Applicants interact with the system through an applicant portal. New users can register themselves on the login page. Although the system does check email addresses for duplicates, it will not stop the user from registering; it will alert the administrator on the back end so that the duplicate records can be merged. Fluxx Grantmaker's integration with GuideStar allows applicants to pre-populate an application form with their organization's information from the GuideStar database by entering their tax identification number. Fluxx allows multiple individuals—both within an organization and from organizations wishing to partner—to collaborate on an application. At this time, the grantee portal is only available in one language, but the vendor reports it is currently developing multi-language capabilities and expects this functionality to be released in 2020.

The system supports multi-stage applications, including eligibility quizzes that can govern which grant applications applicants see in their portal. Application pages can include logos, and can also be styled with headers, colors, and fonts. A foundation can not only include help text for each field of an application, but it can also create landing pages for help documentation available for grantees directly in the grantee portal and add instructions or directions directly on forms and portal information pages. The system does not auto-save data entered into an application; applicants need to click a "save and continue" button to save the data they have entered. Fluxx Grantmaker also offers an integration with DocuSign to allow electronic signatures on applications.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- S **Review Workflow:** Standard

Fluxx Grantmaker offers solid reviewer capabilities. Individuals receive automatic notification when applications are ready to review and access applications assigned to them through a reviewer portal. Applications can be assigned to reviewers on an individual basis or to groups of reviewers organized into panels. They are able to read and/or download the grant information and provide comments and ratings but are not able to see comments and scores from other reviewers. Administrators can allow reviewers to see a history of grants to an applicant and can also assign reviewers additional permissions in the grants management system. Administrators can set up a variety of scoring schemes for different grants and can aggregate and report on the numeric scores. The system supports multiple workflows for grants review processes.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- S **Templates:** Standard
- A **Letters:** Advanced
- B **Board Materials:** Basic

The system allows foundations to communicate with applicants and grantees through email and can generate letters and documents related to grants. In addition to automated emails triggered by certain events, administrators can send emails to individuals and groups, attach files to emails, and include merge fields to personalize the emails or include certain types of information from the system. Fluxx Grantmaker also allows the creation of documents such as letters, grant agreements, and board dockets that contain both merge fields and standard text. Letters can be printed individually or in batch and can be downloaded in Microsoft Word format so that they can be further personalized before sending.

PAYMENTS & BUDGETING

- A **Overall Section Rating:** Advanced
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

Fluxx Grantmaker includes advanced payment and budgeting functionality to allow foundations to approve and track the flow of funds through their grantmaking processes. Grantmakers can bulk update a payment schedule for a set of grants or for all grants and adjust individual payments or create payment schedules on a grant-by-grant basis. Payments can be made conditional on the completion of certain requirements, and grantmakers can automate the payment process by using configurable workflows. Grantees can view their payment schedule through the applicant portal (which also serves as a grantee portal following a grant award).

Foundations can export payment data to accounting software, and Fluxx also offers integrations with a number of financial systems, including Intacct, NetSuite, and Quickbooks Online. Clients also have the option of integrating with other financial systems via Fluxx Grantmaker's API. Administrators can update payment details and create payments in batch and can also void payments and place payments on hold. Administrators can also configure system permissions so that only approved staff can see and change payment information.

There is strong support for payment and budget reporting, with the ability to generate reports on payments made and scheduled to be paid out, as well as payments that carry a variety of coding attributes. Budgets can be tracked by either the amount available, awarded, or paid in a particular year or in hierarchically defined categories or program areas. Administrators can use previous years' budgets as a base and adjust them for the current year and also use fund budgeting to predict cash flow needs based on scheduled payments.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

With the ability to define grant requirements for individual grants, and also a default set that applies to programs or grant opportunities, Fluxx Grantmaker offers solid support for progress and outcomes reporting and evaluation. Grantees can track grant requirement deadlines and submit reports through the applicant/grantee portal and can even see their original stated outcome goals on the progress report form. Foundations can aggregate reported outcomes from all grantees in order to evaluate and report on progress toward programmatic goals. In addition, foundations can capture and report on data along demographic and economic categories to aid in their diversity, equity, and inclusion efforts.

SYSTEM QUERYING & REPORTING

- A **Overall Section Rating:** Advanced
- S **Search:** Standard
- A **Pre-packaged Reports:** Advanced
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

The system offers robust reporting tools that can look at data from nearly any field displayed to users. There is a universal search option at the top of every screen that retrieves results from all fields in the system, although it does not search the content of documents uploaded to the system. Every card on a user's dashboard also has a search function at the top, and the records on each card can be exported to Microsoft Excel with one click. The system offers pre-packaged basic reports that can be modified and saved, as well as ad hoc reports that can include custom data columns, datasets, sorting, grouping, logos, and headers. Reports can include charts and graphs and report data can also be displayed in cards on user dashboards.

SECURITY, PERMISSIONS, & DATA ACCESS

- S **Overall Section Rating:** Standard
- S **Access Control:** Standard
- S **Audit Log:** Standard
- S **Login Security:** Standard
- A **Data Security:** Advanced
- S **Data Exports:** Standard
- S **Integrations:** Standard
- S **Virus Protection:** Standard
- S **Backup and Recovery:** Standard

Administrators have the ability to grant system permissions to users on a granular basis. The system includes a number of security best practices, including system-enforced password complexity rules and automatic log out after a specified time period of inactivity. Fluxx can integrate with a number of Single Sign-On (SSO) solutions, such as SAML, LDAP, Ping, and Okta authentication and with SSO services, such as Okta, Ping, Azure that enable Multi-Factor Authentication (MFA). System actions are recorded in an audit log.

Virtually all data in the system can be exported into another file format, including Microsoft Excel and .csv, and the vendor reports that it is possible to extract data via an optional secondary database. Fluxx offers out-of-the-box integrations with third party financial, email, digital signature, and CRM applications, and can integrate with other REST services from third-party applications and integrations via a two-way synchronous API.

USER EXPERIENCE

- S **Overall Section Rating:** Standard

The card-based interface is polished and neatly laid out and the customizable dashboards allow expert users to set up their workspaces so that they can easily access the key functionality they use most often. However, more casual users might become overwhelmed by the amount of data on dashboards that are not set up with their specific activities in mind and may find that they need to do some extra clicking to get to the specific information they seek. This can be mitigated by thoughtful setup, as the system can be configured to display only certain objects to specific roles.

The system is designed responsively to display across a variety of devices, and Fluxx also offers iOS and Android apps. Fluxx Grantmaker is accessible to users with disabilities and undergoes periodic accessibility audits to ensure conformance to the Web Content Accessibility Guidelines (WCAG) 2.0 Level AA.

SUPPORT & TRAINING

- S **Overall Section Rating:** Standard
- A **Technical Support:** Advanced
- S **Training:** Standard

Initial training (including administrator and "train the trainer") is typically included as part of the system implementation fees. Training can be delivered in-person, recorded, or via video conference. Fluxx also provides technical support, an online knowledge base, and an online user community. Additional training packages may be purchased if necessary.

Stability in the Market

Fluxx Grantmaker has been in use since 2010. The vendor reports that the software package has more than 275 active clients, with 120 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 50

Percent of survey respondents who would recommend the system: 84 percent

Training Score: 0.74

Implementation Score: 0.72

Support Score: 0.64

With more than a decade of service in the marketplace, Foundant has built a track record as a solid, affordable solution for foundations seeking software that can manage a full grant cycle. Foundant's grant tracking is organized around "Processes"—the company's term for programs—in which grant requests are held, but it maintains organization and contact records separate from grant requests to allow foundations to develop a cross-program view of the relationship history with each client.

Much of what you get out of the system corresponds to what you put into it, meaning that, with thoughtful configuration, the system can provide good outcomes measurement and reporting. However, there are limits to areas that can be configured, such as user roles, dashboards, and payment tracking. In addition, a number of system functions standard in other (usually higher priced) systems are only available to Foundant users who subscribe to the most expensive package.

Pricing for the system is based on the complexity of workflow needs rather than the size of the organization. Foundant offers four packages with varying features: Limited, Basic, Standard, and Advanced. The annual cost for the Basic package is $3,500, which includes the ability to manage up to two grant programs in the system but limits a foundation to 100 requests (or applications) a year. There are no request limits for the Standard or Advanced packages. The Advanced package costs $7,250 per year for up to five grant programs. Additional programs can be added to any package at a cost of $250 per year. Training for one administrator costs $1,500.

Small Org, First Year: $5,000*

Small Org, Annual Recurring: $3,500*

Large Org, First Year: $8,750*

Large Org, Annual Recurring: $7,500*

* As of February 2020, and based on a two-year contract

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- B **Organization Records:** Basic
- B **Contact Records:** Basic
- B **Relationship Management:** Basic
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- S **501(c)(3) Status:** Standard
- B **Currency Handling:** Basic

Applications and grants within each process are connected to organization and contact records, which all contain the organizations' and individuals' request histories. While a foundation can associate multiple contacts with an organization and even mark contacts as inactive but retain their data, the system does not provide the native ability to track departments within an organization and would require the use of a custom field to do so.

Users have the ability to add custom fields to organization and user records to track codes or other information, such as demographic data. These custom fields can be restricted to internal users only or be applicant-facing and can be used for reporting. Users can also upload documents to organization and contact records and preview their contents without leaving the system. Administrators can assign tasks to board members or reviewers in the system, or this can be done through workflows.

Foundant's Candid integration provides all system users with access to GuideStar for Grant Applications and Charity Check. Users can auto-populate organizational data and nonprofit status from the GuideStar database, but at this time, the system does not pull in any of the database's demographic information. (The vendor reports that adding demographic information is on the roadmap for 2020.)

GRANT APPLICATIONS

- A **Overall Section Rating:** Advanced
- A **Online Applications:** Advanced
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- A **Autopopulation:** Advanced
- A **Branching:** Advanced
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- A **Multilingual Content:** Advanced

The system provides good support for online applications and applicants. Applications can be customized with logos and font colors and sizes, but they display as one long screen rather than being broken up into sections. Application fields auto save every 100 characters and when moving from question to question. The system facilitates collaboration by allowing the request owner to invite individuals within the same organization or outside it to have access to the application and determine their permissions (e.g. read-only, edit). By default, other contacts associated with the organization in the system have access to view an application, but they have to be invited by the request owner in order to be able to edit.

Applicants can auto-populate organization data in their applications via the GuideStar for Grant Applications integration. Foundations that subscribe to Foundant's Advanced package also have the ability to allow applicants to easily copy answers from previous applications into new applications. Administrators can also manually enter grant applications submitted offline into the system.

Foundant supports Letters of Intent and applications within all packages, but only Advanced package users have the ability to create eligibility quizzes and include branching logic in applications. Eligibility quizzes can also branch to multiple applications.

The applicant portal does provide multiple language support via an integration with Google Translate. Administrators can also build forms in a variety of languages, including languages with non-English characters and non-Latin alphabets, but the buttons on the forms will still display in English.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- S **Reviewer Access:** Standard
- S **Review Workflow:** Standard

The system includes solid support for a variety of review structures and workflows, but does not offer a separate reviewer portal. Reviewers log in to the administrative interface for the system, and a pre-set role limits the elements that are visible to the reviewer. (Reviewers can be assigned additional system permissions, however, and that will increase the number of elements that show on the user's dashboard at log in.)

Administrators can define a default format for grant application summaries, define different information or scoring schemes for different programs, and allow reviewers to see each other's comments and scores. Dashboards include a roll up of review scores for an application and administrators can report scores as summary statistics.

The system supports multiple workflows for grants review processes. While administrators have the ability to configure workflows, the vendor reports that it works with clients during the sales process and implementation to identify processes that comprise a workflow, such as evaluation stages, reviewers, approvers, and more.

COMMUNICATIONS

- A **Overall Section Rating:** Advanced
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- S **Board Materials:** Standard

Users have the ability to create and send emails through the system to individuals and to groups and attach personalized files, and also to create email templates that use merge data from the system. The system also supports automated emails triggered by certain events. Sent emails are included on organization and contact records, and all emails can be viewed together in the "Email History" section of the system. Users can view bounce and open rate metrics for sent emails.

Users can also create a wide variety of letters and documents that include merge data from the system. Letters can be printed individually or in batch and can be opened in Microsoft Word and personalized before being sent.

The system includes a "Trustee" or Board Member role out of the box, which allows foundations to use the system in a manner similar to a board portal. Document templates can be used to create grant summaries or board dockets and additional meeting documents (e.g. board agendas) can be uploaded to the system as well.

PAYMENTS & BUDGETING

S **Overall Section Rating:** Standard
B **Payment Schedules:** Basic
S **Payment Approval:** Standard
S **Payment Details:** Standard
S **Payment Types:** Standard
S **Payment Reporting:** Standard
S **Budget Tracking:** Standard
B **Forecasting:** Basic

Foundant provides solid payment functionality and simple budget tracking. While there is no ability to define a default payment schedule that applies to all grants, administrators can define a payment schedule for each grant and also track non-monetary transactions, such as quid pro quo and in-kind payments. Grantees can view their payment schedules on the applicant portal. Payments can be made conditional on the completion of a requirement, but while the system will show the condition and whether or not it has been met, it does not automatically hold a payment to a grantee. Payment data can be exported to accounting software or an administrator can use document templates to create a check request. Adding payment info to a record can only be done manually, and there is no ability to update payment details and create payments in batch.

The budgeting module shows the amounts that are paid, committed, and available for all programs, as well as on a program-by-program basis. The system can also do basic forecasting via the payment tracking module by setting it to display future payments from payment schedules, and also through the reporting module.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

A **Overall Section Rating:** Advanced
A **Requirements Tracking:** Advanced
A **Progress Reports:** Advanced
A **Evaluation:** Advanced

The system provides good support for assigning, collecting, and tracking grant requirements, such as progress reports, and solid support for evaluation efforts, provided the system is properly configured to collect and report the data. Administrators have the ability to define a default set of grant requirements by grant opportunity or program or for all grants and track which requirements grantees have met. Grantees can track deadlines and submit progress reports through the applicant portal and receive automated emails when items are close to being due and are past-due.

Follow-up documents, such as progress reports, can include fields pulled from the application in read-only format so that grantees and grant managers can view both the original stated outcomes and progress the grantee has made toward the goal. If the field with an outcome goal is set up in an application as a numerical field, an administrator can configure an ad hoc report that calculates progress toward program outcomes. Similarly, if an application is configured to collect demographic data, an administrator can use the reporting tool to use the data for evaluation purposes.

SYSTEM QUERYING & REPORTING

- B **Overall Section Rating:** Basic
- B **Search:** Basic
- S **Pre-packaged Reports:** Standard
- B **Customizing Reports:** Basic
- B **Report Dashboards:** Basic
- S **Ad Hoc Reports:** Standard

Foundant provides a solid reporting tool that provides flexibility for users seeking to use the data collected within the system. While there are some limitations to the search function—there is no universal search tool that returns results from all fields, only searches that are contextual to each area of the system, and the system does not index and search the contents of uploaded documents—users are still able to search for grants and applications by a number of criteria.

The system includes pre-packaged basic reports that users can modify and save, but there is no way to mark a report as a favorite or schedule a report to run automatically and be sent to individuals or groups. Ad hoc reports can include virtually any field in the system and can include charts and graphs, custom data columns, datasets, sorting, and grouping, but not logos and headers. In addition, ad hoc report data can be exported in Excel and .csv formats and Advanced package subscribers can save the data as a read-only API that can be used in business intelligence or data visualization tools, such as Google Data Studio.

SECURITY, PERMISSIONS, & DATA ACCESS

- S **Overall Section Rating:** Standard
- S **Access Control:** Standard
- S **Audit Log:** Standard
- A **Login Security:** Advanced
- A **Data Security:** Advanced
- S **Data Exports:** Standard
- B **Integrations:** Basic
- B **Virus Protection:** Basic
- S **Backup and Recovery:** Standard

With client data stored in multi-tenant databases, SOC 2 Type 1 compliant hosting, and end-to-end encryption of data both in transit and at rest, Foundant follows industry best practices for security. Administrators can enable two-factor authentication and specify password complexity requirements and users are automatically logged out from the system after a specified period of inactivity. At this time the system does not have the ability to integrate with Single Sign On, and the vendor reports that password complexity requirement functionality will soon be made available to clients. Documents that are uploaded to the system are stored in the Amazon Web Services cloud, but Foundant doesn't provide any additional virus scan on upload. (The vendor reports that it is working on an additional virus scan solution to be implemented in 2020.)

The system comes with a set of default permissions separated into five roles. With the Standard and Advanced packages, administrators have access to a sixth "Grants Manager" role that, with the Advanced package, can be customized with a limited number of additional settings. Individuals in the system can be assigned multiple roles. Administrators have the ability to bulk-export all data points held in the system, with the exception of file uploads, which need to be downloaded individually.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The system has a very clean design with clear labels and contrasting buttons and links. The font used on system screens is small. The system is responsively designed so it displays across a variety of devices. Users do not have the ability to customize their own dashboards, as dashboards and reports are the same for all users. The system has not been certified as Section 508-compliant, but the vendor reports that the software is developed according to industry best practices and there are no known conflicts with browsers that assist the visually impaired.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

Administrator training for one individual is covered by a one-time implementation fee. Foundant provides an online learning community and also one-on-one coaching with the customer's client success manager. Customers receive unlimited online, email, and phone support at no additional cost for the entire term of their contract.

Stability in the Market

Foundant has been in use since 2007. The vendor reports that the software package has more than 1,700 active clients, with 600 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 232

Percent of survey respondents who would recommend the system: 93.3 percent

Training Score: 0.96

Implementation Score: 0.95

Support Score: 0.94

foundationConnect

https://www.salesforce.org/nonprofit/foundationconnect/

Salesforce.org added foundationConnect to its portfolio of nonprofit solutions in 2019 after acquiring its vendor, roundCorner, the year before. This cloud-based grants management solution, which is available through the Salesforce AppExchange, is built natively on top of the Salesforce platform and marries Salesforce's powerful CRM solution with tools to manage the grant lifecycle. Functionality can be extended via integrations with other tools available on the App Exchange or using the system's API.

Among the benefits of this Salesforce connection is a connector that allows users to access many parts of the system directly from Outlook, Office 365, and Gmail. This not only allows users to capture emails, contacts, and calendar items within organization, contact, or grant request records, it also allows users to track and complete tasks without having to log into the system.

The system provides good payment tracking support and reporting, with the ability to add numerous data visualizations to system dashboards. A dedicated outcomes reporting module allows foundations to define programmatic benchmarks and collect and report data from grantees on progress toward those outcomes.

Small Org, First Year: The vendor declined to provide pricing for this report.

Small Org, Annual Recurring: The vendor declined to provide pricing for this report.

Large Org, First Year: The vendor declined to provide pricing for this report.

Large Org, Annual Recurring: The vendor declined to provide pricing for this report.

GRANT, CONTACT & ORGANIZATION RECORDS

- A **Overall Section Rating:** Advanced
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- A **Contact Records:** Advanced
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- S **501(c)(3) Status:** Standard
- A **Currency Handling:** Advanced

Organizations and contacts are tracked separately from grants in foundationConnect. Because it is built natively in Salesforce, it does not require an integration for contact management and provides some powerful and flexible relationship tracking capabilities. Many of these actions can be completed directly from Outlook, Office 365, and Gmail accounts, without having to log into the system.

Grants can be tracked by program cycles, board meeting dates, and categories. Foundations can collect and organize a great deal of data within organization and contact records using a variety of custom field types. This can include demographic and economic data about the organization and administrators can create sections within an organization record to group and organize this data. The system includes an integration with Candid to provide 501(c)(3) status checks using the GuideStar database, provided the foundation has a Candid account, but at this time it does not provide the ability to import demographic data from the organization's profile.

foundationConnect allows foundations to manage grants made in multiple currencies. Administrators are able to set and update exchange rates within the system.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- A **Autopopulation:** Advanced
- **Branching:** N/A
- B **Customization - Appearance:** Basic
- S **Customization - Fields:** Standard
- S **Multilingual Content:** Standard

foundationConnect uses Salesforce Communities to enable grantee portals through which individuals and organizations can create accounts, apply for grants, manage profiles, track payments, submit progress reports and other required documentation, and track outcomes.

When creating a new organization account, an applicant can save time and effort by auto-populating organization information using either the nonprofit's tax identification or legal name via an integration with GuideStar. An administrator can decide how the system will handle duplicate registrations—either the system will not allow the creation of a duplicate organization or it will create a duplicate and alert the administrator who can decide whether to merge the duplicate accounts. The system does provide a level of multilingual support for grantee portal users—applicants choose a language when logging into the portal, which will change the language that appears on system buttons and section headers but not the foundation-created content.

The portal can be customized with a foundation's logo and colors, but application fonts and font sizes cannot be changed. Applications can incorporate third-party tools within iframes on separate tabs, such as e-signature tools and surveys. There is no auto-save capability in an application—applicants need to click "save" to move on to the next screen. Budgets can be uploaded as attachments or a grantmaker can build a budget framework for applicants to complete, which can later be used by the grantee in reports. Applicants can also upload other attachments to their application. The system facilitates collaboration on applications by allowing the applicant to add team members both within and outside the organization to work on the application.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- S **Review Workflow:** Standard

Salesforce Communities also provides foundations with the ability to create a portal for external reviewers to access and review grant applications. Reviewers can log into the portal to see reviews assigned to them and deadlines for the reviews. The system can collect and store information about reviewer conflicts of interest, but at this time this information cannot be integrated into review workflow. Administrators can allow reviewers to see scores and comments from other reviewers by providing visibility to reports. Administrators can also add permissions to reviewer profiles to provide them greater access to the system.

The system automatically notifies reviewers when they are assigned an application and supports multiple review workflows. Administrators can view numeric scores and report them as summary statistics.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- B **Letters:** Basic
- B **Board Materials:** Basic

The system allows users to send emails to individuals and groups and to attach files to those emails. The emails can use templates already set up in the system or users can save new templates based on emails they create. These templates can include merge fields and attachments. Users are not able to see email performance metrics, such as delivery, open, and clickthrough rates.

A third-party app, such as S-Docs or Conga Composer, needs to be used to create letters and documents in the system, but these apps allow users to create templates and include merge fields.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- S **Payment Types:** Standard
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

foundationConnect includes strong support for payment tracking. Users can bulk create a payment schedule for a grant and make necessary adjustments on individual schedules or can define a schedule on a grant-by-grant basis. Payments can be split across programs and can be made contingent on the completion of a requirement. Foundations can track quid pro quo and in-kind payments. Payments can be exported to accounting software or foundations can integrate with their AP software. If a foundation needs to create paper check requests, this requires a third-party document creation app, such as S-Docs or Conga Composer.

Applicants can see a list of their scheduled payments and the status of payments on the grantee portal. They can also update their banking information to provide account and routing data for wire transfers—the system encrypts account and routing numbers.

The fC Budgeting module allows foundations to track budgets in hierarchically defined categories or program areas, run budget allocation reports that look at commitments and payment across a range of dates, and access the data required for forecasting and to predict cash flow needs.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

Administrators have the ability to define a default set of grant requirements that can apply to all grant opportunities, to grant opportunities within a specific program, or to specific grant opportunities. The system allows users to track which requirements grantees have met and grantees can track grant requirement deadlines and submit progress reports through the grantee portal.

The system includes a separate Outcomes module that allows users to define different narrative or quantitative outcomes that grantees can select during the application process and report on outcomes across a portfolio. Users can create impact dashboards that show all outcomes across grants and programs.

SYSTEM QUERYING & REPORTING

- A **Overall Section Rating:** Advanced
- S **Search:** Standard
- A **Pre-packaged Reports:** Advanced
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

The global search bar at the top of all screens returns results from across the system separated into record types. While it can search the titles of files uploaded to the system, it is not able to search the contents.

The system includes pre-packaged basic reports that users can run, modify, and save, as well as ad hoc reports that can include data from virtually any field in the system. Users can mark reports as favorites for easy access and can also create numerous data visualizations that can be placed on dashboards.

SECURITY, PERMISSIONS, & DATA ACCESS

- S **Overall Section Rating:** Standard
- A **Access Control:** Advanced
- S **Audit Log:** Standard
- S **Login Security:** Standard
- B **Data Security:** Standard
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- B **Virus Protection:** Basic
- S **Backup and Recovery:** Standard

Administrators have granular control to grant, limit, or restrict user access—not only to a wide variety of system functions, but also on a field-by-field basis. The system includes password complexity rules and logs users out after a specified time of inactivity. Administrators can enable two-factor authentication for access to the administrative side of the system, and the system can also integrate with Single Sign On.

Salesforce also offers an authentication app for mobile devices to provide additional security. The system retains full audit info for two years and a separate product will allow foundations to retain this information for 10 years.

System data is encrypted in transit; however, data at rest is not automatically encrypted. Foundations can encrypt specific fields that need increased security, such as bank account or routing numbers. Integration is available to provide a virus scan for file uploads, but this is not included in the core system subscription.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The interface for the system is polished and neatly laid out. Most of the screens are similar to the core Salesforce user experience. There is a great deal of power and flexibility in the system for power users, but users who are not familiar with Salesforce or not as comfortable with technology may need training to develop a level of comfort with the system. The ability to build "flows," or step-by-step screens that walk users through specific tasks or processes, can help with the comfort level of more casual users.

The system is designed responsively and Salesforce offers mobile and tablet apps. The administrative interface of foundationConnect is accessible to users with disabilities but the grantee and reviewer portals are not currently.

SUPPORT & TRAINING

B **Overall Section Rating:** Basic

S **Technical Support:** Standard

Training: N/A

Salesforce implementation is provided through consulting partners who are also responsible for initial client training. The training costs vary per implementation partner. The vendor does not provide additional training. Salesforce provides a variety of technical support plans at different price points, but does not provide any technical support on the core system to grant applicants.

Stability in the Market

foundationConnect has been in use since 2009. The vendor reports that the software package has 155 active clients, with 78 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY*

Number of survey respondents who reported using the system: 25

Percent of survey respondents who would recommend the system: 88 percent

Training Score: N/A

Implementation Score: N/A

Support Score: 0.73

* implementation and training is done by consulting partners; survey data collected in these categories cannot be aggregated.

GivingData has evolved significantly since 2016 and today is a solid option for foundations looking for a user-friendly solution to manage grants and evaluate impact. The key strengths of the system, which began in 2009 as a Business Intelligence overlay to MicroEdge GIFTS, lie in its payment and budget handling, outcomes and evaluation components, and advanced reporting capabilities.

One feature that sets GivingData apart from other systems is its “Grantee 360” timeline. The timeline includes icons representing grants, payments, requirements, interactions, and “key moments” related to an organization. Users can zoom in on the timeline to focus on one particular segment and click on an icon to go to the corresponding record. Another interesting feature is the “Super Docs” format that allows users to embed merge fields in a document that update in the system as they are edited in the document.

The current system does not include an external reviewer portal and review workflow capabilities, although the vendor reports that these features are currently in development and will be released in 2020. The system allows users to send emails to individuals and groups and to create letters and documents that include personalized data from fields in the system, but at this time system-sent emails cannot include attachments. An Office 365 integration does allow users to easily save emails and attachments sent from Outlook (as well as calendar items) into the system, which provides a possible workaround.

GivingData allows foundations to capture outcomes data from grantees and rate them on a three- or five-degree scale. The system rolls up these outcomes to reporting on a program level to assist in evaluating the impact of the foundation’s giving.

First-year implementation and subscription costs start at about $10,000 for smaller foundations with simple needs, rising to $500,000 or more for very large foundations with complex giving programs. Annual subscription fees range from $5,000 to more than $50,000, depending on the size of the foundation.

Small Org, First Year: $10,000 +
Small Org, Annual Recurring: $5,000 +
Large Org, First Year: $50,000 +
Large Org, Annual Recurring: $25,000 +

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- S **Categorization:** Standard
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- B **501(c)(3) Status:** Basic
- B **Currency Handling:** Basic

GivingData provides a streamlined set of tools for managing grants, organizations, and contacts. Each has a separate record and is associated with related records. Contacts can be associated with more than one organization, allowing foundations to track not just staff but also board members and trustees of organizations. Interactions are stored as separate objects in the database as well, with connections to related contact, organization, and grant records. Attachments uploaded to organization or grant records are stored in the document management platform that the foundation decides to use in connection with GivingData (e.g., Office 365/OneDrive or Box).

Additional data, such as demographic information, can be stored in organization records through the use of custom fields. Custom fields can be grouped in separate tabs or within sections of a tab in order to keep them organized. The system does not include a pre-loaded philanthropic industry taxonomy, but users have the ability to create a controlled vocabulary in the system to aid in classification. They also can use a user-generated "folksonomy" tagging system that includes predictive tagging ability.

The system automatically records all emails and letters generated as interactions. GivingData also provides an integration with Office 365, which allows you to link emails and attachments sent from your email to the appropriate records in the system and record calendar events such as phone calls, meetings, and site visits as interactions. The vendor reports that it is currently exploring the possibility of a similar integration with G Suite email.

Users can verify the tax-exempt status of an organization via the IRS Business Master File by entering the organization's EIN. Users can also automatically link to GuideStar and ProPublica Nonprofit Explorer via an organization's EIN but cannot currently pull information from these sources automatically into the GivingData database.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- A **Autopopulation:** Advanced
- **Branching:** N/A
- B **Customization - Appearance:** Basic
- S **Customization - Fields:** Standard
- B **Multilingual Content:** Basic

GivingData's online applicant portal (which also serves as a grantee portal to allow grantees to track grants following an award) is new since the 2016 *Consumers Guide*. Foundations now have the ability to collect applications online, using a variety of field types. Online applications do not yet have the ability to branch and eligibility quizzes can only include yes/no answers. Applications can include digital signatures via an integration with Adobe Sign, which requires the foundation to have an Adobe Sign account to make full use of the integration. The vendor reports that it expects to release an integration with DocuSign in 2020.

Applicants can create their own accounts online. The system will notify registrants if an account already exists with their email address. GivingData's integration with the IRS Business Master File provides applicants with the ability to search for their organization with either the EIN or the legal name of the organization and they will be able to see possible matches and populate the legal name and address fields of the application. Applicants can add and remove other contacts from their organization to an application for collaboration purposes, and can even collaborate on a partnership application with a contact at another organization provided that contact has been associated with both organizations.

All data entered into an application is auto-saved to avoid the frustration of data loss. While foundations are able to add pictures and their logo to the landing page of the grantee portal and to online forms, there are limitations on a foundation's ability to change font size and colors on an application.

APPLICATION REVIEW

- B **Overall Section Rating:** Basic
- S **Application Review:** Standard
- **Scoring/Rating:** N/A
- **Reviewer Access:** N/A
- **Review Workflow:** N/A

The application review capabilities of the system are limited to the ability to download printable grant information and summaries. The vendor reports that it is building an external review portal and online review functionality that will be released in early 2020, and that, at the same time, it will be adding board portal functionality to provide simplified access to the system for board members.

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COMMUNICATIONS

- B **Overall Section Rating:** Basic
- B **Sending Email:** Basic
- S **Automated Emails:** Standard
- S **Templates:** Standard
- S **Letters:** Standard
- B **Board Materials:** Basic

Users can send emails through the system to individuals and to groups via an integration with SendGrid, but at this time emails cannot include attached files. The vendor reports that email attachments are on the product roadmap and will be available by the end of 2020. Email performance metrics (deliveries, opens, clicks, etc.) are available.

GivingData provides the ability to create letter and document templates (including board dockets) that include standard text and merge fields and print or export the documents to PDF. The system's "Super Docs" format allows users to insert merge fields in a document that will update in the system when changes are made in the document. Super Docs are also able to be exported to PDF.

PAYMENTS & BUDGETING

- A **Overall Section Rating:** Advanced
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

Flexible payment and budgeting tools are a hallmark of the GivingData system. Administrators can define payment schedules individually or create a default schedule that applies to all grants. Payments can be made conditional upon the completion of a grant requirement and the system supports an automated payment process with configurable workflow steps. Users can see upcoming scheduled payments and whether the grantee has met requirements linked with that payment, as well as payments that have been made. It is possible to generate a report of payments made and the amount scheduled to be paid out in a given year, as well as pull reports on payments in a variety of categories. The system integrates with Intacct to facilitate the movement of payment data and can also move data to QuickBooks via the API.

Grantees can view the payment schedule for their awards and add and manage bank accounts to expedite the payment process through the grantee portal.

Foundations can track budgets by the amount available, awarded, or paid in a particular year, as well as in hierarchically defined categories. Budgeting can be multi-tiered and use different sub-categories for different funds.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- S **Requirements Tracking:** Standard
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

The system includes the ability for grantees to track requirement deadlines and submit reports online via the grantee portal. Grantees can also use the portal to request a grant amendment and submit additional information. Users can track the number and type of reports that are due in the near future on a requirements dashboard. The reports feed into GivingData's learning and evaluation framework, which uses a three- or five-degree scale to capture progress toward outcomes that were defined in the application and automatically calculates how many grants follow in each category for each outcome. At this time users are not able to view target outcomes on the same screen as reports, but the vendor notes it is working toward releasing this enhancement in 2020.

SYSTEM QUERYING & REPORTING

- S **Overall Section Rating:** Standard
- S **Search:** Standard
- A **Pre-packaged Reports:** Advanced
- B **Customizing Reports:** Basic
- S **Report Dashboards:** Standard
- S **Ad Hoc Reports:** Standard

The navigation across the top of the system provides access to a quick keyword search of organization, grant, and contact records. There is also a "Super Search" that provides more advanced functionality, including the ability to edit and reorder columns and column labels, to group fields, and to save the search as public or private. Users are able to do batch operations from Super Search results and export search results to Excel. At this time, the system does not index and search the contents of files uploaded to the system from within GivingData, but may be able to do so via the document management tool they use in connection with the system.

The reports tool provides even more sophistication with formatting and output than searches and include multiple query criteria or results sets and up to two levels of grouping, as well as simple calculations (sum, average, and count). At the time of this writing, users do not have the ability to add graphs and charts to reports or to schedule reports to run and be delivered, but the vendor reports both functions are on the 2020 product roadmap.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

S **Access Control:** Standard

S **Audit Log:** Standard

A **Login Security:** Advanced

A **Data Security:** Advanced

S **Data Exports:** Standard

S **Integrations:** Standard

B **Virus Protection:** Basic

S **Backup and Recovery:** Standard

System administrators have a granular ability to grant or restrict user access to a wide variety of system functions. System security is assured by a variety of system controls, including system-enforced password complexity rules, automatic logout after a specified time of inactivity, and the ability to have Single Sign On (SSO). Depending on the SSO service the foundation uses, there is also the possibility of including two-factor authentication.

All client data resides in its own database, either on a virtual private server or on a standalone server. Virus scan of file uploads is governed by the cloud storage system the foundation uses in connection with GivingData.

While most system data can be extracted through the native Super Search, GivingData also provides an add-on offering which makes a copy of the database available for access via an ODBC connection to a third-party business intelligence or data visualization tool (with the exception of encrypted fields such as passwords and bank account information). GivingData also provides a robust API framework for additional third-party software integrations.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The system interface is clean and polished, with easy to read text, large icons, and contrasting colors for action buttons and labels. Menu items are clearly labeled and sections where there are alerts or items needing attention are marked with orange exclamation points. The Grantee 360 timeline is a fairly intuitive visual representation of key data that a user can zoom in and click to access the related record.

The system is responsively designed to display across a variety of devices and is built to conform to W3C's Web Content Accessibility Guidelines 2.0 and Section 508 guidelines. GivingData also integrates web accessibility testing into its code release QA process to ensure alignment with these standards.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

S **Technical Support:** Standard

S **Training:** Standard

Initial training costs for the system are included with the implementation fees. Training consists of a mix of presentations and hands-on exercises that is delivered in person or via webinar and focuses on the features used by the individuals attending the training session. Technical support is available to clients online and via telephone or online meetings, if necessary. In general, GivingData does not provide technical support to applicants or grantees unless the client escalates an issue and asks the vendor to work directly with the applicant/grantee. The vendor reports that it is planning on launching new helpdesk functionality in 2020.

Stability in the Market

GivingData has been in use as a grants management system since 2016. The vendor reports that the software package has 42 active clients, with 40 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 24

Percent of survey respondents who would recommend the system: 95.8 percent

Training Score: 0.90

Implementation Score: 0.89

Support Score: 0.77

SmartSimple is a flexible cloud-based platform that provides grants management solutions for a wide variety of grantmaking programs. The system can be configured to provide a great deal of advanced functionality via robust workflows and a marketplace of pre-built integrations to third-party tools, but this requires the platform's more expensive customized Deploy implementation.

In addition to solid grant tracking, application review, and payment tracking, there are a few notable advanced features. The system provides multilingual support for more than a dozen languages for system text in its applicant, grantee, and reviewer portals, and client-created content can be translated via client-provided language-specific translation files or via a native Google Translate integration. Two system features are especially helpful to foundations that work with grantees with low or unreliable online connectivity: a PDF parser that allows an administrator to generate a PDF form that can be filled out offline, and that automatically enters the data in corresponding fields in the system when uploaded; and a Microsoft Excel parser that can extract values from Excel files and map the data into a variety of fields.

SmartSimple's pricing structure has two main components: a one-time implementation fee for the system build and ongoing recurring subscription fees for access to the system. The subscription fee is based on the number of users who need to access the system and the level of access for each user. SmartSimple's "Direct" implementation provides a simple grants management system and quick implementation for organizations with low volume or basic granting needs and does not include complex automated workflows or extensive integrations. SmartSimple offers a more extensive "Deploy" implementation for organizations looking for a tailored, personalized solution that includes integrations. Subscription pricing for Direct systems is $6,000 per year, with a one-time implementation fee of $6,000. Annual subscription costs for Deploy systems start at around $12,000 and are based on actual usage. The system automatically audits the user type for fair billing.

Small Org, First Year: $12,000 and up.
Small Org, Annual Recurring: $6,000 and up.
Large Org, First Year: $35,000 and up.
Large Org, Annual Recurring: $12,000 and up.

GRANT, CONTACT & ORGANIZATION RECORDS

- A **Overall Section Rating:** Advanced
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- A **Relationship Management:** Advanced
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- A **Demographic Data Collection:** Advanced
- A **Task Management:** Advanced
- A **501(c)(3) Status:** Advanced
- B **Currency Handling:** Basic

SmartSimple provides solid support for tracking grants, organizations, and contacts throughout the entire lifecycle. All information is linked so that users can view related records and data across records, and grants can be tracked by program cycle, board meeting date, or categories. Organization records are separate from grant records and foundations have the flexibility to track nearly any type of information on an organization profile, including demographic data.

The system can pull data from the U.S. Census by state, city, and tract into the organization record based on the organization's location (configuring this feature incurs additional implementation costs based on complexity). Organization profiles include sections to add both contacts (individuals employed by the organization) and associates (individuals affiliated with but not employed by the organization).

Communication with a contact can be determined and even automated based on the role of the recipient. For example, once a payment has been approved, a payment letter can automatically be generated and sent to the individual in the role associated with payments on that record. The system can also integrate with an external contact management system via the API.

Administrators can specify the names of fields used in the administrative interface and can define dropdown values for fields. The system allows administrators to set up a virtually unlimited number of custom fields on different types of records to store internal tracking codes or information submitted by grantees and can be organized into sections for ease of use. The system does not come with a pre-loaded taxonomy but the vendor will generate one for the system based on the client's business processes during the system implementation.

All system-generated communications are captured on associated grant and organization records. In addition, SmartSimple includes a feature called Email Anything that generates unique email addresses for any object or record in the system that can be used to capture email communications occurring outside the system on the related object or record. Users can also upload files to records and can even edit Microsoft Word, Excel, and PowerPoint files without leaving the system.

SmartSimple allows users to check organizations' tax status either as needed or on a defined schedule via an IRS search and can also link to Guidestar. The system also checks organizations against OFAC databases and can bring in LexisNexis data related to an organization.

GRANT APPLICATIONS

- A **Overall Section Rating:** Advanced
- A **Online Applications:** Advanced
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- A **Autopopulation:** Advanced
- A **Branching:** Advanced
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- A **Multilingual Content:** Advanced

The system provides a portal for use by applicants and grantees. New users can register themselves; if an account with that email address already exists in the system, the users will be notified and prompted to log in to the existing account. (The system also conducts checks for duplicate records and flags potential duplicates for an administrator to review.) Once users log into the portal, they will have the option of choosing from three different interfaces (Web, Flat, and Classic) and of selecting their preferred language. The system supports more than a dozen languages and each field supports multilingual captions, help text, and validation messages. When the users select their language of choice, the related language captions are displayed. Narrative data can be translated through a native Google Translate integration and clients may also provide language-specific translation files.

Applications can be customized with logos, colors, fonts, and navigation, and can include a wide variety of field types. Applicants can upload documents, images, and videos as attachments to an application. A foundation user can collaborate with an applicant by using annotation mode to add notes to fields that display to the applicant. Multiple employees within an organization can work on an application and a foundation can set up multi-organization applications to allow affiliated organizations to collaborate. Support for eligibility quizzes and Letters of Intent are available to clients with SmartSimple's Deploy implementation. Support for electronic signatures is available via integrations with several third-party providers that are available in SmartSimple's Marketplace.

Two system features are especially helpful to foundations that work with grantees with low or unreliable online connectivity. The first is a PDF parser that allows an administrator to generate a PDF application or form and email it to an applicant. The applicant can fill out the form offline and email it back to the administrator. When the completed application is uploaded, all data from the completed form is automatically saved to the corresponding fields in the system. This can work for any form in the system, including application reviews, progress reports, and site visits. The other feature is a Microsoft Excel parser that can extract values from Excel files and map the data into a variety of fields. This can allow applicants to upload budgets in Excel documents that can be mapped to fields in the system. A client has the option to set the Excel parser up themselves or to have it set up by the vendor. The PDF parser in most cases requires Deploy implementation.

APPLICATION REVIEW

- A **Overall Section Rating:** Advanced
- A **Application Review:** Advanced
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- A **Review Workflow:** Advanced

SmartSimple provides advanced functionality to support application reviews. The system supports different scoring schemes for different programs and administrators can create multiple review workflows. An administrator can define a default format for grant summaries and select which fields to include, and reviewers can view and print summaries and full grant information. Reviewers can be assigned to applications individually or as part of a panel group and assignment can be automated so that the system will assign them based on a set of defined business guidelines.

An administrator can also create a workflow to check for reviewer conflicts of interest before making an assignment.

The reviewer receives an automatic notification when they are assigned an application and can log into a reviewer portal to see the applications assigned to them. Administrators can allow reviewers to see the relationship history that the foundation has with an organization as well as other reviewers' scores. Administrators can view the numeric review scores and report them as summary statistics. Reviewers can also complete reviews offline via a form created with the PDF parser and a user can upload the completed form to the system. Reviewers can also be assigned other system permissions to allow enhanced system access.

COMMUNICATIONS

- A **Overall Section Rating:** Advanced
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- S **Board Materials:** Standard

Users can send emails to individuals and groups through the system or the software can be configured to send emails and attachments through the client's system. In addition to direct emails, SmartSimple includes the ability to send broadcast emails and view performance metrics for emails sent using the broadcast email tool. Users can create email and letter templates that include both standard text and merge data, as well as attached files. Administrators can print letters or grant summaries either individually or in a batch (using workflow functionality). The system also supports the creation of board dockets and can provide board portal access, as portal access to the system is role-based. SmartSimple can also integrate with third-party board portal software via API.

PAYMENTS & BUDGETING

- A **Overall Section Rating:** Advanced
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- A **Payment Details:** Advanced
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- A **Forecasting:** Advanced

The system allows administrators to set up a general payment schedule for all grants and adjust manually or to schedule payments on a grant-by-grant basis. Payments can be split across funds and can be made contingent on the completion of a grant requirement. Users can also deny pending payments and place them on hold. All implementations allow export of payment data to accounting and clients with the Deploy implementation can set up two-way integration with accounting systems to bring in payment details.

Users can track budgets in hierarchically defined categories or program areas and by the amount available, awarded, or paid in a giving year. Previous years' budgets can be used as a base and adjusted for the current year and predictive analytics can be used to forecast budget outcomes.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- S **Progress Reports:** Standard
- A **Evaluation:** Advanced

Reporting schedules for grants can be defined in advance either for all grants, by grant opportunity or program, or on a grant-by-grant basis. SmartSimple's SmartCheck Validation checks for contingent activities such as progress reports and, as the due date approaches, the user would get reminders to submit their reports. Once the due date passes, things like payments would not be finalized until the progress report is submitted. Grantees can also check the status of required reports on their portal dashboard.

The system supports online submission of progress reports and can automatically calculate progress toward goals defined by the grantee in their application based on progress reporting that roll up to a grantmaker's program-level outcomes. The metrics related to these goals can be aggregated and reported across programs and for all grantees. The Direct implementation includes one post-award reporting form and additional forms can be developed, with the cost of the additional forms depending on complexity.

SYSTEM QUERYING & REPORTING

- A **Overall Section Rating:** Advanced
- A **Search:** Advanced
- A **Pre-packaged Reports:** Advanced
- S **Customizing Reports:** Standard
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

SmartSimple includes contextual searches inside different modules of the system as well as a "search files" function that can search the contents of readable attachments uploaded to the system. Users can run basic reporting and advanced search on any list view in the system. While the system does not include a set of pre-packaged reports out of the box, the vendor reports that it works with the client during implementation to collect reporting requirements and build the reports into the system. Users can create ad hoc reports using a drag-and-drop interface and these reports can include calculated fields, formatting, and charts and graphs. Ad hoc reports can also be added to dashboards. Administrators can create pre-built reports for specified user roles and users can use those reports as templates to build other reports or create new reports. Reports can be scheduled to run periodically and sent to individuals or groups using workflow rules.

The system also includes "SmartCards" that allow users to click a star on any record in the system—individuals, organizations, grants, reports—and it will be added to a card that can be accessed by the user and/or shared with other users.

SECURITY, PERMISSIONS, & DATA ACCESS

- A **Overall Section Rating:** Advanced
- A **Access Control:** Advanced
- S **Audit Log:** Standard
- A **Login Security:** Advanced
- A **Data Security:** Advanced
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- S **Virus Protection:** Standard
- S **Backup and Recovery:** Standard

SmartSimple's access control permissions are both attribute-based and role-based. Administrators have the ability to configure an unlimited number of attributes that can be used to control view, add, edit, delete, and assign user permissions down to the field level. Login security can be enforced with password complexity rules, automatic log out after a specified time of inactivity, and the ability to enable multi-factor authentication by role. Users can also self-select Multi-Factor Authentication. The system does support Single Sign On integration for clients using the Deploy implementation. SmartSimple's platform includes native GDPR-compliant features, including data categorizations and policies that enables information to be flagged down to the field level as Personally Identifiably Information (PII).

SmartSimple provides a variety of hosting options including multi-tenant (public cloud), single-tenant (private cloud), and on-premises. Clients also have the option to combine cloud deployment with on-premises backup. SmartSimple and its hosting partners are all SOC 1 and SOC 2 certified. All data within the system can be extracted by a system administrator.

The system includes a number of pre-built integrations with third-party solutions via its Marketplace and the vendor also provides both JSON- (including OData) and SOAP-based APIs to enable clients to build custom integrations.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The interface is polished and neatly laid out, with clearly-marked colored action buttons. The system modules run across the top of the page with contextual menus on the left side and tabs separating sections within a record. Administrators have a great deal of control in configuring the system for users, but the number of modules and depth of functionality means that more casual users will likely require training to use the system effectively. The system is designed responsively and the vendor also provides a mobile app. Administrators can define which system modules and tasks are available to app users. The vendor reports that it has a consultant who works with the development team to ensure that the system is fully accessible to users with disabilities, but accessibility can be compromised if a client does not set the system up properly.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

The vendor provides technical support to clients via phone, email, and live agent chat 24 hours a day, five days a week. Optional add-on Support360 provides technical support for applicants, reviewers, and grantees. Clients can select the types of training that meet their needs and budget, with training offered in-person, online via web conference, and online via video. Training costs are included in the initial system price estimate. Additional training sessions are available as needed and quarterly training packages are available.

Stability in the Market

SmartSimple has been in use since 2003. The vendor reports that the software package has more than 350 active clients, with 90 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 63

Percent of survey respondents who would recommend the system: 83.3 percent

Training Score: 0.81

Implementation Score: 0.86

Support Score: 0.81

Submittable

Submittable is an affordable, user-friendly tool that allows foundations to create online applications and forms, track submissions, facilitate reviews, and create reports. Since our 2016 report, the platform has added basic payment and budget tracking functionality along with enhancements to review functionality, messaging, and reporting, and the vendor reports additional enhancements being developed for release in 2020.

Applications and other forms are easy to create, format, and assign to reviewers. The administrative interface for the system is simple and easy to learn, but the ability to customize this interface is limited. The level of system access for users is governed by five preset roles. Organizations only need one account in the system to apply for grants from any grantmaker using Submittable.

The system only tracks grants and does not provide separate organization or contact records. Reviews can go through multiple workflow stages and can use a variety of scoring schemes. Users can record payments for grants that can be exported for use by finance departments and these payments roll up to high-level budgets entered into the system. Workarounds are required to schedule payments as installments, or make them contingent on completion of requirements. The system includes a variety of standard reports and allows for ad hoc reporting as well.

Subscription pricing for the system is a custom quote based on the number of staff members and reviewers using the system, as well as the number of submissions allowed per year.

Small Org, First Year: The vendor declined to provide specific pricing information.

Small Org, Annual Recurring: The vendor declined to provide specific pricing information.

Large Org, First Year: The vendor declined to provide specific pricing information.

Large Org, Annual Recurring: The vendor declined to provide specific pricing information.

GRANT, CONTACT & ORGANIZATION RECORDS

- B **Overall Section Rating:** Basic
- S **Grant Tracking:** Standard
- **Organization Records:** N/A
- **Contact Records:** N/A
- B **Relationship Management:** Basic
- S **Record Updates:** Standard
- B **Field Customization:** Basic
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- S **Task Management:** Standard
- **501(c)(3) Status:** N/A
- B **Currency Handling:** Basic

Submittable provides solid grant-tracking abilities, but the lack of separate organization records means that a user would need to search and filter to find previous submissions or run a report to see an organization's history with the foundation. Grant records include all system-generated emails and activity and provides a notes section to log communications such as phone calls or meetings with the applicant. Content in the record is collected via the online application and therefore can include a virtually unlimited number of custom fields that can be used for ad hoc reporting. Grant applications can include applicant-uploaded attachments that are stored in Submittable's Amazon Web Services cloud and can be downloaded or previewed within the system. Grants may be filtered by program, by category, and by date submitted.

Administrators can assign tasks to users in the system manually or via workflow. User dashboards display specific submission data and are not customizable. At this time, Submittable does not have the ability to check an organization's 501(c)(3) status, but the vendor reports that a GuideStar integration is in development and slated for release in 2020.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- B **Autopopulation:** Basic
- S **Branching:** Standard
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- S **Multilingual Content:** Standard

Grant applicants can sign into the system to view and submit applications online using either their Google credentials or by creating a username and password. Once a user creates an account it will work for any organization using Submittable.

Administrators create application forms through a simple drag-and-drop interface. These forms can include a wide variety of field types, and can be customized with logos, colors, fonts, and navigation. Administrators can also create custom CSS to further control application display. Data entered into application forms is auto-saved every few seconds.

The system supports multiple application stages and forms can support eligibility questions that branch to different content on the application. The vendor reports that it is building more robust quiz functionality. At this time, in order for applicants to carry data from previous forms into a new one, the new form needs to be created as a secondary form to the previous one, which attaches the new form to the original application. Administrators do not have the ability to enter submissions received offline, but the vendor reports that it can offer a custom solution to import offline submissions for an additional fee.

Currently, the system does not allow multiple grantees within an organization to work on a single application unless they share a login, and does not support partnership applications where two or more organizations collaborate on a single grant. The vendor recently released a new feature called "collaborative drafts" to allow the primary applicant to invite other individuals to work on an application. Submittable does have multilingual support in a variety of languages for system buttons.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- B **Reviewer Access:** Basic
- S **Review Workflow:** Standard

Reviewers access the system via the administrative interface rather than through a reviewer portal, with their assigned roles governing what they can see in the system. Reviewers can read or print grant information and submit comments and scores online. Reviewers with the lowest permission level cannot see scores from other reviewers, but those with higher permission levels can. Notes and messages on grant applications can be shared with all reviewers. Reviewers are notified when an application is assigned to them, but the administrator does not receive notification when reviews are completed.

The system supports different scoring schemes for different programs and administrators can view the numeric scores and report on them as summary statistics. In addition, administrators can define multiple workflows for grant review processes.

COMMUNICATIONS

- B **Overall Section Rating:** Basic
- S **Sending Email:** Standard
- S **Automated Emails:** Standard
- B **Templates:** Basic
- **Letters:** N/A
- **Board Materials:** N/A

Submittable allows email to be sent through the system to applicants or to the reviewers assigned to the application and also the sender to attach files to email. Administrators can also set up automated emails that are sent based on certain events. The system provides the ability to set up email templates that include standard text and mail merge data but does not support the creation of letters or other documents.

PAYMENTS & BUDGETING

- B **Overall Section Rating:** Basic
- B **Payment Schedules:** Basic
- B **Payment Approval:** Basic
- B **Payment Details:** Basic
- **Payment Types:** N/A
- S **Payment Reporting:** Standard
- B **Budget Tracking:** Basic
- **Forecasting:** N/A

Since the publication of our 2016 report, Submittable has added in a "Funds" feature that enables an administrator to indicate awarded and paid amounts on submissions but does not trigger payments to be made. These payment amounts can be exported to a finance team, but payment details cannot be imported into the system. The system supports simple budgeting, with administrators setting up funds and payments rolling up to those funds. Payments can be split across funds but paying grants in installments requires a system workaround.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

B **Overall Section Rating:** Basic

B **Requirements Tracking:** Basic

S **Progress Reports:** Standard

Evaluation: N/A

Grantee progress reporting in the system is set up on a project level using the "additional forms" functionality. This provides online forms that allow grantees to submit required reports. Administrators can track which grantees have submitted required reports by running a report in the system. At this time there is no ability to aggregate and report on outcomes at a program level in the system.

SYSTEM QUERYING & REPORTING

B **Overall Section Rating:** Basic

S **Search:** Standard

A **Pre-packaged Reports:** Advanced

B **Customizing Reports:** Basic

Report Dashboards: N/A

B **Ad Hoc Reports:** Basic

The system provides a universal search to retrieve results from all data fields in the system but it is not able to search the contents of uploaded attachments. The system includes a set of standard reports as well as ad hoc reporting capability that can include nearly every field displayed to users. Ad hoc reports can include charts, graphs, and tables. Dashboard views are set by the system to display specific submission data and are not customizable.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

B **Access Control:** Basic

S **Audit Log:** Standard

A **Login Security:** Advanced

S **Data Security:** Standard

A **Data Exports:** Advanced

S **Integrations:** Standard

B **Virus Protection:** Basic

S **Backup and Recovery:** Standard

System access is governed by five preset levels of permission. Increased login security is enabled with Single Sign On integration, which also provides administrators with the ability to enable two-factor authentication. Users are automatically logged out of the system after a specified time period of inactivity. System data is encrypted both in transit and at rest. The system uses standard Amazon Web Services protocols to protect against malicious code and does not provide additional virus scans for uploaded files.

Submittable offers some pre-built integrations to extend system functionality and also has a public REST API for clients to build custom integrations.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The user interface for Submittable is very clean and uncluttered. Text is readable and it is clear which elements are action buttons. The system is user-friendly and easy to learn, with drag-and-drop form and report creation. Key navigation elements run across the top of the screen while contextual navigation and related links are in a column on the left side. The system is responsively designed and does not have a mobile app. Submittable has a Voluntary Product Accessibility Template (VPAT) and is designed to follow industry standards for accessibility.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

Technical support is available via email, phone, and chat to all administrators on accounts and applicants also have access to support via email and chat. Submittable has an online Help Library for users and clients are invited to monthly training webinars, recordings of which are hosted on the Submittable website. User training can be provided through individual onboarding packages that are available for purchase and the vendor also offers additional supportive service packages for purchase.

Stability in the Market

Submittable has been in use since 2010. The vendor reports that the software package has more than 10,000 active clients, with more than 550 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 5

Percent of survey respondents who would recommend the system: 90 percent

Training Score: 0.96

Implementation Score: 1.0

Support Score: 0.91

SurveyMonkey Apply (formerly branded as FluidReview) is an online application management platform that provides foundations with the ability to collect applications and progress reports online; track and manage grants; allow online application reviews; communicate with applicants and grantees; track payments; and run reports. The system has an easy-to-use interface that was built with the non-technical user in mind. Role-based interfaces provide views and functionality focused on the needs of certain groups of users, and are also used to manage applicant and reviewer access to the system (rather than through separate portals).

Applicants who are the primary contact for an organization can manage their organization profiles themselves, and have the ability to add other users, set up teams, and manage which users have access to specific applications. Reviewers can be assigned to applications either manually or randomly by specified characteristics. Those who prefer to work offline can download applications and then enter their reviews in a simple "quick form." Applications and other forms are built through a drag-and-drop interface, as are workflows and ad hoc reports. The system offers multilingual support for applicants, allowing them to view the site content in English, French, and Spanish.

The system has limited functionality in the areas of payment and budget tracking, but payments can be made conditional on the completion of a grant requirement, and administrators can track scheduled payments and whether grantees have met the requirements.

Pricing for the system is based on number of programs and the number of expected applicants. Implementation services are included in the subscription cost.

Small Org, First Year: $7,000
Small Org, Annual Recurring: $7,000
Large Org, First Year: $12,000
Large Org, Annual Recurring: $12,000

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- B **Contact Records:** Basic
- B **Relationship Management:** Basic
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- S **Categorization:** Standard
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- S **501(c)(3) Status:** Standard
- B **Currency Handling:** Basic

Foundations can use SurveyMonkey Apply to track grants and linked records throughout the entire grant lifecycle. Organization records are tracked separately from grant records to allow users to see a history of all grants to an organization. Organization contacts are set up as user accounts in the system and can be marked as "inactive" to retain their historical association with the organization without providing access to the system. For foundations wishing to extend contact and organization record functionality, the vendor offers an integration with Salesforce.

System-generated emails are not automatically attached to grant, organization, or contact records, but instead are saved in a searchable email log. Interactions can be manually added to grant records via the "notes" section on each application (with the ability to control whether the notes are visible to reviewers) and to organization or contact records via custom fields. Custom fields can be added to a variety of record types and can be configured as several different types of fields. These fields can be used to collect demographic information on programs and organizations. They can be updated manually by administrators or automatically with system automations. There is no limit to the number of custom fields that a foundation can create. Administrators can also categorize records in the system using either pre-defined or user-generated labels.

Tasks can be assigned to users via workflows and the system can be configured to allow administrators to manually assign tasks to users in the system. Users will see tasks assigned to them when they log into the system. The system also includes an integration with Guidestar that allows a foundation to check the 501(c)(3) status of an organization and also incorporate 501(c)(3) status checks into applications by having a grantee enter the organization's tax ID number.

GRANT APPLICATIONS

- A **Overall Section Rating:** Advanced
- S **Online Applications:** Standard
- A **Collaboration:** Advanced
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- A **Autopopulation:** Advanced
- A **Branching:** Advanced
- B **Customization - Appearance:** Basic
- S **Customization - Fields:** Standard
- A **Multilingual Content:** Advanced

The system provides robust functionality in the area of online grant applications. Applicants can register as an individual or as an organization. When a new applicant creates a user account in the system, the system will check to see if the user's email address already exists in the system and, if so, will prompt the user to recover the password. There is no separate applicant portal; the system provides role-based interfaces, so applicants only see the content related to the actions they can take. On logging in, existing users will see their active applications, awards, and any tasks assigned to them. The system supports multiple application stages, as well as eligibility quizzes that can branch to multiple application forms.

Applicants that serve as administrators for their organization's account can update the organization profile manually or by pulling in information from GuideStar. They can also add other staff to the organization profile and add them to teams within their organization in order to track departments or business units. Applicants can collaborate with individuals at other organizations by setting up a team for external partners and adding those individuals to the team.

Application forms are created through a simple drag-and-drop functionality that allows administrators to choose from a variety of question types, including electronic signatures, and that can include branching logic. Applicants can upload documents, spreadsheets, images, and videos to their applications. The system offers multilingual support for English, French, and Spanish that will translate all of the interface text when selected. The vendor can also provide a translation template once a site is built so that the client can create and upload translations for their own forms.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- S **Reviewer Access:** Standard
- A **Review Workflow:** Advanced

Reviewers also log in to the system and are presented with an interface specific to their role. After logging in, reviewers see a list of the programs and stages that contain their active assignments. Administrators can define the information from an application that they would like to highlight to reviewers on the assignment table and summary tab at each stage of the review workflow. A reviewer can choose to export a PDF for each application assigned to them, a PDF for each application with attachments in their original format, or a single PDF with all selected applications. Reviewers who prefer to do their work offline can download the applications and, after completing their reviews, enter their responses in a simple "quick review" form.

Administrators can define multiple workflows and different scoring schemes for each application and can see and report on numeric scores from reviewers. Reviewers can be assigned to applications manually or an administrator can enable automatic review assignments that either distribute applications randomly or auto-assign reviews based on custom criteria. Reviewers can also mark applicants where they have a conflict of interest and the system will store that information and not assign them reviews of that applicant's submissions in the future. The system automatically notifies reviewers when they are assigned applications.

COMMUNICATIONS

- B **Overall Section Rating:** Basic
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- S **Templates:** Standard
- B **Letters:** Basic
- **Board Materials:** N/A

SurveyMonkey Apply allows clients to send emails and attachments through the system to individual contacts and groups. Administrators can also set up automated emails that are sent based on certain events and email templates that include both standard text and merge data from system fields. Emails are not attached to grant, organization, or contact records, but are accessible in a searchable log. The log also includes some basic email performance metrics: sent emails, messages not sent, bounced messages, and error details if an email is not sent.

The "Dynamic Documents" function allows users to create .docx files in Microsoft Word that include merge field variables from SurveyMonkey Apply and attach those documents either to manually-triggered or automated emails. The system will populate the document with the merge data when the email is sent. This can be used to personalize documents such as letters and grant agreements.

PAYMENTS & BUDGETING

B **Overall Section Rating:** Basic

B **Payment Schedules:** Basic

A **Payment Approval:** Advanced

S **Payment Details:** Standard

Payment Types: N/A

B **Payment Reporting:** Basic

B **Budget Tracking:** Basic

B **Forecasting:** Basic

The system provides limited functionality in the areas of payment and budget tracking. Payment schedules need to be defined on a grant-by-grant basis, either individually when making an award or in bulk for multiple awardees at one time. The system is not able to track quid pro quo or in kind payments. Payments can be made contingent on the completion of a grant requirement and can be approved manually or through a workflow process. Awards are tied to applications and administrators can see all past and future payments associated with an application, along with any notes associated with those transactions, and completion of the tasks associated with the application. Payment data can be exported to accounting software or an integration can be set up using the system's API.

Budgets can be tracked at the program level. Payments can be split across more than one program for budgeting purposes. Program budgets and transactions are displayed in the sections for each program in the system. In addition, the financial management dashboard displays amounts paid, allocated, and balance remaining, along with the percentage of budget utilized for each program budget. The system allows users to update program balances via a spreadsheet and also set up funds that can be used to track larger pots of money that can be transferred into program budgets. Administrators can use the report builder to look at payments and projected payments for basic forecasting.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

S **Overall Section Rating:** Standard

A **Requirements Tracking:** Advanced

S **Progress Reports:** Standard

S **Evaluation:** Standard

Administrators can configure requirements and workflows for each program, including automated reminders that are sent based on a user having incomplete tasks or on specific deadlines. As with applications, online progress report forms can be built with a simple drag-and-drop interface and can bring in project goals identified in the initial grant application, collect data on outcomes, and include calculations that will calculate an organization's progress toward goals. Reporting on outcomes across grantees is done through the report builder.

SYSTEM QUERYING & REPORTING

S **Overall Section Rating:** Standard

S **Search:** Standard

A **Pre-packaged Reports:** Advanced

B **Customizing Reports:** Basic

Report Dashboards: N/A

S **Ad Hoc Reports:** Standard

Users are able to search for applications and grants by a number of criteria and perform a number of actions on this filtered set of grants. A universal search accessible from the toolbar at the top of the screen brings in results from all data fields, although it is unable to search the contents of uploaded documents. The system includes a variety of reporting dashboards that users can view and interact with but cannot modify. The report builder provides a drag-and-drop interface to create ad hoc reports that can bring in data from nearly every field in the system and can also incorporate charts and graphs, custom data columns, sorting, grouping, logos, and headers.

SECURITY, PERMISSIONS, & DATA ACCESS

S **Overall Section Rating:** Standard

S **Access Control:** Standard

S **Audit Log:** Standard

A **Login Security:** Advanced

S **Data Security:** Standard

A **Data Exports:** Advanced

S **Integrations:** Standard

S **Virus Protection:** Standard

S **Backup and Recovery:** Standard

Administrators can grant, limit, or restrict user access to a wide variety of system functions with role-based permission sets. User actions and changes are recorded in an audit log. Login security is managed by system-enforced password complexity rules and automatic logout after a specified time of inactivity. SurveyMonkey Apply can integrate with several Single Sign On (SSO) systems and, if using SSO, the client can also use that system's Multi-Factor Authentication. Users can self-reset their login credentials via a standard password reset email, but administrators cannot reset credentials on behalf of users.

Data resides on a shared server with client data logically segregated from other clients. The vendor provides end-to-end encryption and a virus scan for all file uploads. All data within the database can be extracted by a system administrator. The vendor provides a pre-built integration with Salesforce and provides an API to allow clients to extend system functionality through integrations with other third-party platforms and tools; however, the vendor cautions that clients who use the API are responsible for building and maintaining their own integrations.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The interface for SurveyMonkey Apply is simple and clean. System modules are represented as icons with tool tips that appear on hover in a toolbar that runs across the top of the interface, with dropdown contextual menus organized in buttons or in section headers. Much of the system is built to provide non-technical users the ability to perform a wide range of tasks. Workflows are created through drag-and-drop functionality that allows a user to add a stage and then work through a series of screens that define what happens in the stage. Automations are easy to create, with plain-language instructions. Role-based interfaces allow administrators to simplify system views for casual users.

The system is designed responsively to display across a wide range of devices; there is no mobile app. The system is not fully accessible by default, but the vendor reports that the system allows clients to create an experience for applicants that is compliant with Section 508 and WCAG 2.0 accessibility standards.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

The system includes unlimited technical support that is available online, by email, and by telephone. During the implementation process the client works with an implementation specialist who will provide multiple demonstrations of the functionality as the site is being built. The vendor also offers a library of self-guided training resources that cover all aspects of building and managing a site. Additional training options are included with some packages or clients can purchase them for an additional fee.

Stability in the Market

SurveyMonkey Apply has been in use since 2011. The vendor reports that the software package has approximately 2,700 active clients, with about 2,000 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 6

Percent of survey respondents who would recommend the system: 41.7 percent

Training Score: 0.86

Implementation Score: 0.74

Support Score: 0.6

WebGrants, created by Dulles Technology Partners, is a cloud-based grants management system that has been in use for nearly two decades with the majority of its client base in the government sector. The vendor's work for government clients has led it to develop advanced workflow support, a strong security framework, and very granular access control.

The system provides good support for foundations seeking to strengthen their ability to capture and report on grant activities and outcomes. The configuration of different types of records in the system allows grantmakers to easily find related records and view all interactions with an organization or contact. While the system does not offer separate portals for applicants or reviewers, role-based permissions allow administrators to define what these types of users see and the actions they can take when they log in. The software does not have any pre-built connections to or integrations with services that allow grantmakers to view or update organizations' 501(c)(3) status, although the vendor notes that a client can request an integration (for an additional fee). The vendor has developed pre-built integrations with several types of accounting software and also provides access to an API to allow clients to extend system functionality with other third-party tools.

The system is on the cusp of a major overhaul. The vendor reports that it has completely rewritten its software and will be transitioning existing customers to the new system in 2020. While the core functionality will essentially be the same as the existing product, the vendor reports the new version will have a responsive interface and a better user experience and also provide multilingual functionality and multi-currency handling.

Small Org, First Year: Approximately $50,000
Small Org, Annual Recurring: Approximately $6,600
Large Org, First Year: Approximately $150,000
Large Org, Annual Recurring: Approximately $13,200

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- B **Relationship Management:** Basic
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- S **Attachments:** Standard
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- **501(c)(3) Status:** N/A
- B **Currency Handling:** Basic

WebGrants provides solid support for tracking grants, organizations, and contacts. All three types of records are tracked separately and are connected so that it is easy to access related records and data across records. Users can track individual departments or business units within an organization and multiple contacts can be associated with an organization.

Grant records retain all system-generated letters and emails, but there is no ability to capture emails sent from external email software other than by manually entering it in a communications log. Users can also log other activities, such as phone calls and site visits, on grant records. Tasks can be assigned to users in the system either manually or via workflows and appear on a user's dashboard.

Administrators can specify the names of fields displayed in the interface, define dropdown values for fields such as program or grant codes, and define custom categorization codes for tracking and reporting. The system supports the creation of a virtually unlimited number of custom fields to collect a wide range of data for grants, organizations, and contacts, including demographic data. As part of implementation, the WebGrants system is connected to the client's cloud document storage system in order to store files attached to grant or organization records.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- S **Collaboration:** Standard
- S **File Uploads:** Standard
- B **Account Creation/Login:** Basic
- S **Autopopulation:** Standard
- S **Branching:** Standard
- S **Customization - Appearance:** Standard
- S **Customization - Fields:** Standard
- B **Multilingual Content:** Basic

The system provides numerous options that allow users to create applications and that facilitate the application process. Applicants log in to the administrative interface for the system and a pre-set role limits the elements that are visible to the applicant and defines the actions that are available to the applicant. The login page can be customized with the client's logo and includes additional customized elements, such as announcements, videos, and links.

A first-time applicant can create an account in the system. If a person creates an account using an email address that is already in the system, WebGrants will allow the creation of the duplicate account but will notify an administrator of the potential duplicate. The system can auto-populate organization data in an application for applicants already in the system and applicants can copy answers from previous applications into new opportunities. While the system does not auto-save data entered into an application, applicants will receive a popup notification if they try to navigate away from a screen without saving or if the session timeout is approaching.
The system facilitates collaboration on applications within an organization, and if two different organizations want to collaborate

on a partnership application, a contact from one organization can be associated with the other organization to provide access to the application.

Applications can include a wide variety of question types, including dropdown menus, checkboxes, and text fields, and text can be customized with colors and fonts. Forms can have multiple sections and can include mathematical calculations that subtotal or total values entered into fields.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- A **Reviewer Access:** Advanced
- S **Review Workflow:** Standard

The system includes solid support for a variety of review structures and workflows but does not offer a separate reviewer portal. Applications are assigned to either individual reviewers or to pre-set panels and reviewers receive an automatic notification that they have applications ready for review. Reviewers log in to the administrative interface for the system and a pre-set role limits the elements that are visible to the reviewer and the actions a reviewer can take. (Reviewers can be assigned additional system permissions, however, and that will increase the number of elements that show on the user's dashboard at login.)

The system supports different information and scoring schemes for different programs and the ability to define multiple workflows for grant review processes. Reviewers have the ability to provide comments and ratings for each application and an administrator can allow reviewers to see other reviewers' comments and scores. The numeric review scores can be aggregated and reported as summary statistics.

COMMUNICATIONS

- A **Overall Section Rating:** Advanced
- A **Sending Email:** Advanced
- S **Automated Emails:** Standard
- A **Templates:** Advanced
- A **Letters:** Advanced
- B **Board Materials:** Basic

WebGrants supports both email and letter communications, with the ability to create letter and electronic templates that include both standard text and merge data, as well as attachments. A user can email either individuals or groups. Email is delivered through the WebGrants system and the vendor reports it can integrate with Exchange if requested.

The ad hoc reporting tool in the system can be used to create board dockets and the system's role-based permission supports the creation of limited, read-only access that allows board members to access certain information, such as uploaded documents (which can be used to share meeting agendas and other materials), reports, and grant statuses.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- S **Payment Details:** Standard
- S **Payment Types:** Standard
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- B **Forecasting:** Basic

Users can define either a default payment schedule that is applied to all grants with the dates and amounts adjusted manually or create payment schedules on a grant-by-grant basis. Grants can be made contingent on a specified grant requirement and payment approval is held until the requirement is completed. Users can also void payments and place payments on hold. The system supports an automated payment approval process with configurable workflow steps. Users can see upcoming scheduled payments and whether the grantee has met the requirements linked with that payment and grantees can view the payment schedule for their awards online.

Payment data can be exported to accounting software and the vendor reports that it has experience integrating WebGrants with numerous financial systems. The system can also facilitate the creation of paper check requests for an individual grant or batch of grants. Payment records can include user notes and details such as the date paid and check number. Users can generate a report of payments made and scheduled to be paid out in a given year and pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.

The system supports the ability to track program budgets within hierarchical categories and by the amount available, awarded, or paid in a particular year. Grants can be split across more than one program for budgeting purposes. Program budgets can also be mapped to their entries in the finance system to ensure changes are reflected in both systems. Budget and payment data can be included in ad hoc reports that a user can download to Excel for forecasting purposes.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- A **Progress Reports:** Advanced
- A **Evaluation:** Advanced

WebGrants provides advanced support for collecting and evaluating outcomes data. Administrators can define a set of grant requirements that apply to all grant opportunities or can define requirements by program or grant opportunity. Grantees can track grant requirements and submit progress reports online, with the system automatically calculating progress toward identified goals. Users can see both the original outcome goals and grantee responses from progress reports on the same screen. The system can aggregate outcome data, including demographic and economic data, for reporting across program and across all grantees.

SYSTEM QUERYING & REPORTING

- S **Overall Section Rating:** Standard
- S **Search:** Standard
- S **Pre-packaged Reports:** Standard
- B **Customizing Reports:** Basic
- A **Report Dashboards:** Advanced
- S **Ad Hoc Reports:** Standard

Users can access a universal search that retrieves results from all data fields in the system but the search does not index the content of files uploaded to the system. The system includes a variety of standard reports that users can filter, sort, subtotal, and hide columns, as well as a robust ad hoc reporting tool that can draw data from fields throughout the system. Users cannot display report data as graphs or charts, but report data can be exported to Excel or data visualization tools for more advanced manipulation. Reports cannot be scheduled to run automatically and sent to individuals or groups.

SECURITY, PERMISSIONS, & DATA ACCESS

- A **Overall Section Rating:** Advanced
- A **Access Control:** Advanced
- S **Audit Log:** Standard
- A **Login Security:** Advanced
- A **Data Security:** Advanced
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- S **Virus Protection:** Standard
- S **Backup and Recovery:** Standard

Administrators have a granular control in granting, limiting, and restricting user access to areas of the system, with more than 100 system privileges available. A variety of login security measures are available, from password complexity rules to two-factor authentication. Single Sign On integration is also available.

The system is cloud-based, with each client instance housed on a virtual private server rather than a shared server, and with end-to-end encryption of data. All file uploads are scanned for viruses and malicious code and data is backed up nightly, with disaster recovery services available. Administrators can extract all data stored within the system and can define who has the ability to extract information from the system.

The vendor has experience developing integrations with third-party tools and also provides clients with access to an API that allows them to extend system functionality with additional integrations.

USER EXPERIENCE

S **Overall Section Rating:** Standard

The layout and design of the software should feel familiar to individuals who have experience working in databases, but more casual users might find the screens dense and the font small. Role-based access to the system allows administrators to set up simplified versions of the interface for different types of users to mitigate this concern. Primary navigation is separated into modules and clearly labeled, with secondary navigation nested beneath. Contextual navigation appears in a tab-like format in some modules of the system, but some of these labels are truncated and it's not immediately clear what they represent. Action buttons are clearly labeled and appear in several different colors but they are the same colors and shapes as status or taxonomic labels.

The current system is not optimized to appear across a variety of devices, but the vendor reports that the design of the of the new system will be fully responsive. The vendor reports that the software is Section 508 compliant and fully accessible to users with disabilities.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

All staff members at a client organization are eligible for initial training as part of the implementation agreement. Additional training is available for a fee. Clients are able to access support for any reason under the vendor's maintenance and support plan. Applicants and grantees who are having trouble with the system are able to call with support issues if the client is unable to resolve the problem.

Stability in the Market

WebGrants has been in use since 2001. The vendor reports that the software package has more than 50 active clients, with fewer than 10 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of Survey Respondents Who Reported Using the System: 5

Percent of Survey Respondents Who Would Recommend the System: 70 percent.

Training Score: 0.87

Implementation Score: 0.83

Support Score: 0.59

Zengine by WizeHive is a flexible and robust grants management system that can scale from a low-cost option with more-limited functionality for foundations with more simple needs to an Enterprise-level system that includes extensive integration and customizations. The system has undergone significant changes since the 2016 edition, and WizeHive reports it is migrating many clients from the Select (legacy) platform to Zengine.

The strengths of this system lie in its flexibility, with drag-and-drop functionality that allows users to personalize and filter views of data in the system; its ability to link data across the system and make that easily accessible from any type of record; and its ability to integrate with numerous third-party systems to extend functionality. It also provides some less-common features, including the ability to provide Excel .csv versions of application forms that applicants can fill out offline and upload to the system; use its reviewer portal to provide functions similar to a board portal; and collect objectives as separate records and link them to different types of records across the system.

Subscription pricing is based on several factors, including the number of programs that will be managed in the system, the complexity of those programs, and the features required. Pricing is generally divided into three levels that roughly corresponds to the needs of small, medium, and large organizations: Core, Premium, and Enterprise. More advanced functionality (including the submission portal that allows grantees to track their grant through its full lifecycle) and customization is available for subscribers to the Premium and Enterprise packages. There is no implementation cost for the Core package or for a simple configuration of the Premium package, but implementation fees for more complex needs can range from approximately $2,000 to $15,000.

Small Org, First Year: $3,900-$9,995
Small Org, Annual Recurring: $3,900-$9,995
Large Org, First Year: $12,000-$65,000
Large Org, Annual Recurring: $10,000-$50,000

GRANT, CONTACT & ORGANIZATION RECORDS

- S **Overall Section Rating:** Standard
- S **Grant Tracking:** Standard
- S **Organization Records:** Standard
- S **Contact Records:** Standard
- B **Relationship Management:** Basic
- S **Record Updates:** Standard
- S **Field Customization:** Standard
- S **Custom Fields:** Standard
- A **Attachments:** Advanced
- B **Categorization:** Basic
- S **Demographic Data Collection:** Standard
- A **Task Management:** Advanced
- B **501(c)(3) Status:** Basic
- B **Currency Handling:** Basic

Zengine by WizeHive pairs flexible grant tracking with an easy-to-configure Customer Relationship Management (CRM) tool. Grant, organization, and contact records all display on the left side of the screen with linked records appearing on the right. A drag-and-drop form builder allows foundations to easily add a variety of custom fields to organization records and organize them on the screen, which enables the capture of nearly any type of data, including organizational demographic data. All system-generated interactions, such as emails and letters, can be captured and linked to related grant records. It is also possible to capture emails sent from external email systems into records via customization work by the vendor.

Grant and organization records display in tables with data in columns that can be filtered, added/removed, and reordered and grouped via drag-and-drop functionality. This allows for easy grouping of grants by category or cycle, and these views can be saved for later access. The system allows batch updates to records

Users can upload documents to the system and attach them to records. The content of readable uploaded documents is indexed and included in search results. The system's integration with GuideStar Charity Check allows users to look up an based on the nonprofit's tax ID number, but at this time does not bring in organization demographic information.

GRANT APPLICATIONS

- S **Overall Section Rating:** Standard
- S **Online Applications:** Standard
- S **Collaboration:** Standard
- S **File Uploads:** Standard
- S **Account Creation/Login:** Standard
- S **Autopopulation:** Standard
- S **Branching:** Standard
- B **Customization - Appearance:** Basic
- S **Customization - Fields:** Standard
- B **Multilingual Content:** Basic

All subscription packages allow foundations to collect grant applications online, but Zengine by WizeHive customers subscribed to the Premium or Enterprise packages also have a robust submission portal that allows applicants/grantees to track their grants through their full lifecycle. When new applicants create accounts, the system checks their email addresses and prompts them to recover their passwords if the addresses already exist in the system.

The system supports eligibility quizzes for customers at the Premium and Enterprise levels, but the quizzes cannot branch to multiple application forms. Once a draft record is saved, the system will automatically save any information entered into an application from that point forward. Applications can be customized with a variety of different types of fields and can include a foundation's logo, but the colors, fonts, and navigation cannot be changed.

One feature that can be helpful for applicants with low internet connectivity is that the system allows applicants to download an Excel .csv of the application form that can be filled out, uploaded, and parsed into system fields. The system also supports collaboration on applications and partnership applications with simple customization and configuration. While the system does not include electronic signature capability or an integration with a third-party provider, they do provide fields that can be used for check boxes and typed name signatures.

APPLICATION REVIEW

- S **Overall Section Rating:** Standard
- S **Application Review:** Standard
- A **Scoring/Rating:** Advanced
- B **Reviewer Access:** Basic
- S **Review Workflow:** Standard

Zengine by WizeHive offers reviewer portals for customers at all plan levels. Reviewer records are set up in the system differently from contacts and do not have the ability to have additional system permissions assigned to them. It is possible to track potential conflicts of interest for a reviewer by creating a custom field on the reviewer record and setting up a rule to check against the field, but that would require customization work.

When reviewers are assigned an application, they are notified by email and can log into the reviewer portal. The dashboard displays all the applications assigned to them with large buttons showing the status of their reviews. Administrators can set up different information and scoring schemes for different programs, view and report on numeric scores, and define multiple workflows for grant review processes. They can also allow reviewers to see each other's comments and scores.

COMMUNICATIONS

- S **Overall Section Rating:** Standard
- B **Sending Email:** Basic
- S **Automated Emails:** Standard
- S **Templates:** Standard
- S **Letters:** Standard
- S **Board Materials:** Standard

The system allows users to send emails to contacts via a built-in integration with SendGrid. SendGrid does provide reporting on email performance metrics, such as opens and clicks. At this time, emails cannot include attachments. The system also allows administrators to set up automated emails that send based on certain events.

Users can create letter and email templates as well as documents that combine standard text and merge data. Letters can be printed individually; printing a batch of letters requires customization. The system does support the creation of board dockets and administrators can also set up the review portal to function similar to a board portal to display grant applications and serve as a repository for board agendas and other relevant documents.

PAYMENTS & BUDGETING

- S **Overall Section Rating:** Standard
- S **Payment Schedules:** Standard
- A **Payment Approval:** Advanced
- S **Payment Details:** Standard
- A **Payment Types:** Advanced
- S **Payment Reporting:** Standard
- S **Budget Tracking:** Standard
- S **Forecasting:** Standard

Zengine by WizeHive provides solid payment functionality and budget-tracking functionality with appropriate setup. Administrators can define a payment schedule on a per grant basis or create a default payment schedule that applies to all grants and can be adjusted individually. Payments can be made contingent on completion of a specified grant requirement, and with appropriate workflow configuration or via reporting a user can see upcoming scheduled payments and whether the grantee has completed any linked requirements. Grantees can view the payment schedule for their award through the submission portal (which requires Premium or Enterprise packages).

Payment data can be exported to accounting software or the system can generate check requests. The system can also be customized to integrate with a variety of accounting software. Grant award records can include account and routing data for wire transfers and the system can also track quid pro quo and in-kind payments.

The system allows users to track budgets by a variety of factors, including the amount available, awarded, or paid, and in hierarchically defined categories or program areas. Users can also pull reports on budgets with a variety of coding attributes, but this requires additional setup work. Similarly, additional setup is also required to generate forecasting reports that show current year payments to date plus projections.

GRANT REQUIREMENTS & OUTCOMES EVALUATION

- A **Overall Section Rating:** Advanced
- A **Requirements Tracking:** Advanced
- S **Progress Reports:** Standard
- A **Evaluation:** Advanced

Administrators can define grant requirements, either for all opportunities or at the individual grant or program level. Grantees can submit progress reports online and administrators can track which requirements grantees have met. The submission portal is required to allow grantees to track their grant requirement deadlines online. If this is set up, grantees can see tasks due by drilling down into individual grants (tasks do not show up on the portal dashboard).

The system does collect objectives (i.e. outcomes) for grants and displays them as linked records for grants in the system. While the system does not automatically calculate the progress toward these outcomes from progress reports, this does allow users to aggregate and report on outcomes across all grantees. With proper setup, users are also able to report on data based on demographic and economic categories.

SYSTEM QUERYING & REPORTING

- S **Overall Section Rating:** Standard
- A **Search:** Advanced
- B **Pre-packaged Reports:** Basic
- B **Customizing Reports:** Basic
- S **Report Dashboards:** Standard
- S **Ad Hoc Reports:** Standard

While the system does not provide a universal search that retrieves results across all data fields in the system, search and filter options are available for all areas of the database and search results can even include relevant attachments. Any data view set up by a user can easily be exported to Microsoft Excel.

The system does not include pre-packaged basic reports, but the vendor reports that it works with clients to set up reports and dashboards based on their needs and KPIs. Ad hoc reports can be set up to include nearly any field in the system and can include custom data columns, sorting, grouping, and formatting. Reports can be marked as favorites, but this is set on a program level, not a user level. Dashboard widgets are available but can only be customized by administrators for roles in the system (not by individual users). Dashboards can include charts, graphs, and summary data.

SECURITY, PERMISSIONS, & DATA ACCESS

- S **Overall Section Rating:** Standard
- S **Access Control:** Standard
- S **Audit Log:** Standard
- A **Login Security:** Advanced
- S **Data Security:** Standard
- A **Data Exports:** Advanced
- S **Integrations:** Standard
- B **Virus Protection:** Basic
- S **Backup and Recovery:** Standard

Zengine by WizeHive provides a great deal of documentation on its security and data protection policies. There are system-enforced password complexity rules and automatic logout after a specified time period of inactivity. For security reasons, only applicants/grantees are able to reset lost login credentials. Clients subscribed to the Enterprise plan have the option to enable Single Sign On (SSO), and the ability to enable two-factor authentication is based on their SSO implementation. Administrators can grant or limit user access to a wide variety of system functions via role-based permissions settings.

Client data resides on a multi-tenant database housed in the Amazon Web Services cloud, but every client has its own workspace and can access only its own client data. Administrators also have the ability to extract all data from the database and perform their own data backups. Virus scan and security measures are based on the AWS standard, and Zengine by WizeHive was recently certified as SOC 2 compliant.

The system provides an open API to facilitate integrations and includes a built-in connection with Zapier for access to the solution's numerous platforms. It also can provide a direct integration with a client's Salesforce database.

USER EXPERIENCE

- S **Overall Section Rating:** Standard

The system interface is very polished and dashboards are neatly laid out. System functions are displayed as icons across the top, so it will likely take some training or hands-on use for new users to figure out where certain functionality resides. However, once they get accustomed to the system, they will discover that it is easy to accomplish many tasks through drag-and-drop functionality. Records are displayed in table format, and the font in the tables is very small, but columns can be added, hidden, or re-arranged to meet a user's needs. Expert users can use this flexibility to be able to quickly accomplish tasks.

The system is designed responsively and can be accessed across a variety of devices, but there are no mobile apps available. The vendor reports that the submission and reviewer portals are Section 508-compliant, using WCAG 2.0 standards.

SUPPORT & TRAINING

S **Overall Section Rating:** Standard

A **Technical Support:** Advanced

S **Training:** Standard

Zengine by WizeHive provides a KnowledgeBase of articles, videos, and other resources to help clients refresh training or troubleshoot issues. If clients cannot resolve an issue on their own, they have access to a support team, with support offered for free to all clients.

New clients receive training through their implementation team via web conference, videos, and one sheets. The vendor also offers free client webinars on new features and skill-building topics two to four times a month. Setup and training is either included in the annual subscription cost or as a one-time implementation fee.

Stability in the Market

Zengine by WizeHive has been in use since 2014. The vendor reports that the software package has more than 750 active clients, with 349 of those being private or family foundation clients.

CUSTOMER EXPERIENCE SURVEY

Number of survey respondents who reported using the system: 15

Percent of survey respondents who would recommend the system: 96.7 percent

Training Score: 0.97

Implementation Score: 0.89

Support Score: 0.92

APPENDIX A: RESEARCH METHODOLOGY ▶▶▶

Tech Impact Idealware has developed a rigorous methodology governing the research for all of the reports in our Consumer Guide series. The following is an overview of the process.

Eligibility Criteria

First we defined a set of criteria to govern the eligibility of software packages for inclusion in this report (gating criteria).

For this edition, we decided to focus solely on grants management software for private foundations.

Our definition of a grants management system includes 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.

To be included in the report, a system must offer:

- Customizable online applications and forms
- Online review and scoring of applications
- The ability to track grantee relationships
- The ability to generate documents and/or emails
- Payment tracking
- Flexible and customizable reporting

While previous editions of this report included server-based software, the rise in popularity of remote and "virtual" organizations over the past several years led us to focus this edition on cloud-based solutions accessible across a variety of devices.

Finally, to be eligible for inclusion, a vendor had to have a minimum of 30 clients, at least 10 of which were foundations. We considered several systems that fell short of one element of our gating criteria. In these situations, the project team discussed whether the product offered a unique feature or filled a niche, and looked to see whether the system was being used by respondents to our customer experience survey.

Product Selection

We started with the list of systems evaluated in our 2016 report. The market has seen numerous changes since its publication. Some vendors left the grants management space, others were affected by mergers and acquisitions. We also received several requests from vendors to be included, and worked with subject matter experts to help determine which were eligible for evaluation.

We included systems that we knew met our eligibility criteria on our final roster. For systems less known to us, we emailed an eligibility questionnaire to their vendors to determine whether their software fit our GMS definition.

Sixteen systems included in the 2016 edition do not appear in this edition. Five of those are no longer on the market:

- Easygrants
- EasyMatch (merged with Cybergrants)
- PhilanTrack
- Smalldog (merged with Foundant)
- WizeHive Select

The remaining 11 did not meet our gating criteria:

- Common Grant Application
- First Pearl
- GEMS
- GrantsOnline™
- Good Done Great Grants Management System
- Granted GE Spectrum
- GrantMaker
- PowerOFFICE
- proposalCENTRAL
- Versaic Grants
- ZoomGrants

The final result was a list of 16 systems, including three systems making their first appearance.

Evaluation Criteria

In the interest of streamlining the report to make it easier to review and compare systems, for this edition we changed the evaluation structure from a lengthy list of requirements criteria to a rubric of key functionality in the following 12 areas:

- Grant, Contact & Organization Records
- Grant Applications
- Application Review
- Communications
- Payments & Budgeting
- Grant Requirements & Outcomes Evaluation
- System Querying & Reporting
- Security, Permissions, & Data Access
- User Experience
- Support & Training
- Stability in the Market
- Customer Experience Survey

We started by sending email questionnaires to five subject matter experts. We asked them to identify emerging technology trends for grants management systems, critical functionality in today's grants management systems, and differentiators between systems currently on the market.

We combined their feedback with the criteria used for our 2016 grants management report and grouped and mapped the criteria into a rubric covering 65 functions. We solicited feedback on our rubric from three subject matter experts in the grants management field and used that feedback to refine and finalize the rubric. We've shared the rubric in the next section of this guide.

From late November 2019 through January 2020, we conducted detailed software demos of 16 grants management packages. Following the demos, we dropped two additional systems from the list, leaving the 14 represented in this guide.

Customer Experience Survey

Beginning in November 2019, Tech Impact Idealware and the report partners—Grantbook and PEAK Grantmaking—all distributed a customer experience survey to their respective email lists and asked vendors of included systems to distribute the survey to clients.

In all, the survey received 622 responses. For each system review, we've published how many people reported using the grants management software in the survey. We also include scores in a range from -2 to 2 based on those users' reported experiences with the training, support, and implementation offered by the systems' vendors; and what a weighted percentage of those respondents would recommend the system to others.

Note: The sample size for many of these systems was very small. As a result, this survey should not be taken as a rigorously scientific research method, but we still felt the results to be useful for foundations considering all factors when making a software selection decision.

We've reprinted the content of the survey in Appendix C beginning on page 135.

How We Evaluated the Systems

The reviews are much easier to understand when considering the vast amount of information gathered 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 common foundation needs and the features on which packages typically differed: Basic, Standard, and Advanced. 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.

APPENDIX B: FEATURES RUBRIC ▶▶▶

Grant, Contact & Organization Records	Basic	Standard	Advanced
Grant Tracking	• Tracks basic grant info, such as name, request amount, organization, program with which a grant is associated, grant information, grant status • Stores and links information for each grant proposal through its entire lifecycle • Tracks grants by program cycle or board meeting date, and by categories	• Both individual applicants and organizations can apply for grants from the same grant program • View related records and data across records • Tracks by percentage or dollar allocation across programs	
Organization Records	• Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization • Retain former staffers associated with a grant on an organization's record without making them active contacts for communications	• Track individual departments or business units under a larger organization	
Contact Records	• Associates multiple contacts with an organization and define their relationships	• 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)	• Links to external contact management systems
Relationship Management	• Records all system-generated letters and emails for each grant • Log communications such as phone calls and emails with a contact or organization	• Capture emails from external email systems into grantee or organization records	• Capture emails from external email systems into a grantmaker-specified record type (organization, grant, contact, report, payment, etc.)
Record Updates	• Update basic grant information like project names or codes throughout the process	• Perform batch updates of record fields such as project codes, status, categorization	
Field Customization	• User can define dropdown values for fields such as program or grant codes • User can specify the names of fields displayed in the interface	• User can group or arrange fields in sections or tabs	

Grant, Contact & Organization Records	Basic	Standard	Advanced
Custom Fields	• Create custom fields to store internal tracking, demographic data, or information submitted by grantees	• Add a virtually unlimited amount of custom fields	
Attachments	• Stores attached documents in the database as objects rather than links OR attached documents are uploaded to the server and a link to the file is stored in the database	• Auto-launch and read the file by using a locally installed version of the application (e.g., Word, Excel, Acrobat Reader)	• In-system preview of common media types
Categorization	• Defines custom categorization codes for tracking and reporting	• Allows user-generated tagging of content	• Includes pre-loaded philanthropic sector-based taxonomy to aid in optional and predictive tagging of information entered into the system
Demographic Data Collection	• Allows organizations applying for grants to input demographic data into custom fields	• Allows collection of demographic data for projects and programs, as well as for organizations	• System can pull demographic information into organization records from a standard registry of 501(c)(3) nonprofits
Task Management	• Administrators can manually assign tasks to users in the system	• Tasks can be assigned to users through workflow functionality	• "Dashboard" views summarize the grants and tasks currently relevant to each user
501(c)(3) Status	• View organizations' record and tax status in a standard registry of 501(c)(3) nonprofits and flag those not listed	• Auto population of related fields for legal name, EIN, and tax status	• Automatically performs status checks and updates in batch on a specified schedule via connection to a standard registry of 501(c)(3) nonprofits
Currency Handling	• Supports grants in a single currency	• Supports grants made in multiple currencies by storing currency and exchange rate information	• Live integration to foreign exchange rate providers • Admin can make an exchange rate static at certain project phases and for specified grantee payments with ability to refresh to current value

Grant Applications	Basic	Standard	Advanced
Online Applications	• Supports multiple application stages • Applicants can save and return to their applications • Applicants can easily view or print applications	• Create new online applications without additional vendor charges • Information entered into application is auto-saved after a specified time period or navigation to another field	• Support for electronic signatures • Applicants can complete a fillable offline form that can be uploaded in the core system so that the embedded data can be auto-imported into the core system

Grant Applications	Basic	Standard	Advanced
Collaboration	• Ability to reopen online applications once they've been submitted if more information is required and/or applicants can collaborate with a reviewer on a proposal prior to submitting the final application	• Allows multiple grantees with separate login credentials in an organization to work on a single application.	• Supports partnership applications where two or more organizations can prepare, submit, and manage a single grant
File Uploads	• Applicants can upload documents, spreadsheets, and images as part of an application	• Applicants can upload video files as part of an application	
Account Creation/Login	• Flags duplicate email addresses in the system for an administrator to merge into one record manually	• Checks the email address of each new registrant and prompts the user if it is a duplicate	
Auto-population	• Automatically pulls data from online applications into the core grants management system	• Carries over contact information and other appropriate data from previous applications or from a Letter of Intent to a proposal.	• Organization profile information is automatically pulled into the system by entering the organization's EIN
Branching		• Grant application forms can branch	• Eligibility quizzes can branch to multiple applications
Customization - Appearance	• Admin can add a logo to online application forms	• Admin can customize online forms with colors, fonts, navigation	
Customization - Application Fields	• Allows custom dropdowns, checkboxes and text fields • Adjust character or word counts for form fields	• Allows administrators to customize help text for fields • Displays how many words or characters remain in a field	
Application Review	• System supports non-English characters and keyboards	• Multilingual capabilities - applicant can select language of portal experience for system-generated content	• System integrates with online translation add-ons • Advanced multilingual capabilities - all content displays in language selected by applicant

Application Review	Basic	Standard	Advanced
Application Review	• Print full grant information without attachments • Print grant summaries	• Print full grant information, including attachments • Define a default format for grant application summaries and choose which fields to include	• Reviewers can download and access proposal contents offline and then make their entries in a system that can be uploaded to the specified grant record
Scoring/Rating	• Allow reviewer comments and ratings for each application	• Allow reviewers to see each other's comments and scores • Supports different information or scoring schemes for different programs	• View numeric review scores and report them as summary statistics

Application Review	Basic	Standard	Advanced
Reviewer Access	• Simplified "portal" interface to allow reviewers to see and review grant applications without navigating the full grants management interface	• Allow reviewers to see relationship history with prospective grantees	• Allow other system "permissions" to be assigned to reviewers
Review Workflow	• Automatic notification when applications are ready for review • Automatic notification when reviews are completed	• Administrator can define multiple workflows for grants review processes	• Track external reviewers' interests, potential conflicts of interest, and geographic location or area of expertise and use those criteria to assign applications for review • Ability to assign reviewers at random based on workload or other attributes

Communications	Basic	Standard	Advanced
Sending Email	• Send email through the system to an individual • Send email through the system to a group • Send group emails not as blind copies, but rather as one-to-one	• Attach files to emails sent to individuals and groups	• Emails sent through the system to individuals can include selected personalized files (e.g. a grant contract) as an attachment • View email metrics, such as open rate, clickthrough rate, unsubscribe rate, number of clicks on each link, and bounce reports
Automated Emails	• Set up and send automatic emails based on certain events		
Templates	• Provides several standard letter and electronic templates that you can generate using grant record information	• Can create custom letter and electronic templates that include both standard text and "mail-merge" type inserted data	• Can create custom letter and electronic templates that include both standard text and "mail-merge" type inserted data plus attached files
Letters	• Insert mail-merge data into letters	• Print letters or summaries either individually or for a batch of grants or grant applications in a single step	• View and personalize individual letters before printing them
Board Materials	• System supports creation of board dockets	• System provides Board Portal access to system	• Integrations available with third-party board portal software

Payments & Budgeting	Basic	Standard	Advanced
Payment Schedules	• Define a payment schedule and amounts for each grant • Grantees can view the payment schedule for their award(s) online through the grantee portal	• Define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually	

Payments & Budgeting	Basic	Standard	Advanced
Payment Approval	• See upcoming scheduled payments and whether the grantee has met requirements linked with that payment	• Payments can be made contingent or conditional upon a specified grant or payment requirement	• Supports an automated payment approval process with configurable workflow steps
Payment Details	• See payments that have been made, including amount, date paid, and check number • Include notes on a payment • Export payment data to (or integrate with) accounting software	• Configure audit or security controls to ensure that only certain staff can change payment information • Supports payments to organizations other than the primary grantee • Void payments and place payments on hold	• Update payment details and create payments in batch
Payment Types	• Can generate an individual or batch of paper check requests for accounting	• Supports wire transfers by securely storing required information and confirmation codes for successful transactions	• Track quid pro quo and in-kind payments
Payment Reporting	• Generate a report of payments made and the amount scheduled to be paid out in a given year (including carryover from previous years' grants)	• Pull reports on payments that carry coding attributes of associated requests, organizations, and contacts	
Budget Tracking	• Track budgets by either the amount available, awarded or paid in a particular year • Split grants across more than one program for budgeting purposes	• Track budgets in hierarchically defined categories or program areas • Pull reports on budgets that carry coding attributes of associated requests, organizations, and contacts	
Forecasting	• Use previous years' budgets as a base and adjust them for current year	• Use scheduled payment data to predict cash flow needs for a specified time period	• Generate reports showing current year payments to date plus projections for anticipated payments for one grantee, for a program area, and for all grantees

Grant Requirements & Outcomes Evaluation	Basic	Standard	Advanced
Requirements Tracking	• Define a default set of grant requirements for all grant opportunities • Track which requirements grantees have met • Allow grantees to track grant requirement deadlines online	• Define a default set of grant requirements by grant opportunity or program	• Auto-create a personalized email and web portal reminder for grantees of missing requirement(s) that they are obligated to provide as a condition of receiving their next grant payment

Grant Requirements & Outcomes Evaluation	Basic	Standard	Advanced
Progress Reports	• Allow grantees to submit progress reports either through online forms or as an attached file	• Automatically calculates progress toward grantee or program outcome goals using submitted progress reports • Admin can copy and create online progress report forms without paying additional vendor fees	• View both original outcome goals and grantee responses from submitted progress reports on the same screen
Evaluation	• Allow evaluation of outcomes data on a grant	• Allow evaluation of and reporting on outcomes across programs and/or all grantees	• Enable capture and reporting of data along demographic and economic categories

System Querying & Reporting	Basic	Standard	Advanced
Search	• Search for grants and applications by a number of criteria, and view pre-packaged reports based on this filtered set of grants	• Universal search to retrieve results from all data fields in the system	• Auto-index and search the contents of file attachments and all other system stored files
Pre-packaged Reports	• Run pre-packaged basic reports	• Drill down for more information on some or all reports	• Create, view, and export data in a visual graphic representation such as charts and graphs
Customizing Reports	• Make minor updates to standard reports • Save reports that you create or modify	• Reports can be set to automatically run and sent to individuals or groups	
Report Dashboards	• View favorite reports without navigating a much-larger set		• Multiple unique customizable dashboards
Ad Hoc Reports	• Supports ad hoc reports that can include nearly any field displayed to users	• Ad hoc reports can include custom data columns, datasets, sorting, grouping, logos, and headers	

Security, Permissions, & Data Access	Basic	Standard	Advanced
Access Control	• Administrators can grant, limit, or restrict user access to certain areas of system information, such as a module	• Administrator can grant more granular access to view, edit, or delete data for a wide variety of system functions	• Administrator can define user or group permissions on a field-by-field basis
Audit Log	• Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log		

Security, Permissions, & Data Access	Basic	Standard	Advanced
Login Security	• Automatic log out after a specified time of inactivity • System-enforced password complexity rules • Both applicant and grantmaker can reset lost login credentials	• Ability to enable two-factor or security key login authentication	• Ability to have Single Sign On • Ability to self-select two-factor login
Data Security	• Vendor provides a detailed service-level agreement (SLA) covering security framework and guarantees	• Data resides on a virtual private server or a dedicated physical server	• End-to-end encryption of data
Data Exports	• Lets you export all data visible to users into another file format, such as .xls, .csv, or .pdf.	• All data stored within the database can be extracted by a system administrator	• Administrator can define who can extract information from the system
Integrations	• The vendor has experience in integrating with at least one external accounting software package	• Vendor permits clients to extend system functionality via integrations with third-party systems through an API or other access to underlying database and code	
Virus Protection	• Built-in virus scan or security feature for all file uploads		
Backup and Recovery	• Vendor provides a detailed service-level agreement (SLA) covering data backup and disaster recovery		

User Experience	Basic	Standard	Advanced
Look and Feel	• The interface is polished looking and neatly laid out	• Buttons and links are easily distinguishable from text	
Ease of Use	• 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	
Mobile & Tablet Display	• System can be accessed across a variety of devices (desktop, mobile, tablet)		• Provides apps or views specifically designed for mobile devices
Accessibility	• System is fully accessible to users with disabilities		
Role-based Interfaces	• Has at least two different internal interfaces to provide a simpler experience for users with less complex needs (e.g. occasional users, management, board members)		

Support & Training	Basic	Standard	Advanced
Technical Support	• Vendor provides either online or printed help manuals	• Vendor provides phone support	• Vendor provides unlimited phone and email support within a yearly fee or maintenance package • Vendor provides technical core system support for applicants
Training	• Vendor provides training	• Vendor provides initial training in person or via the Internet at no additional cost, and additional training sessions can be purchased and scheduled	• Vendor can provides online core system user training videos, plus contracted personalized videos for grantseekers and grantees in English and also in different languages

Stability in the Market	Basic	Standard	Advanced
History	• The software package has been in use by clients for more than one year	• The software package has been in use by clients for more than three years	• The software package has been in use by clients for more than five years
Client Base	• The vendor reports that the software package has more than 10 active clients	• The vendor reports that the software package has more than 20 active clients	• The vendor reports that the software package has more than 50 active clients

APPENDIX C: CUSTOMER EXPERIENCE SURVEY

1. **What system do you use to manage your grantmaking process?**

2. **How long have you had the system you currently use?**
   - < 1 year
   - 1-3 years
   - 4-7 years
   - 7+ years

3. **Would you recommend this system to another grantmaker?**
   - Yes
   - No
   - Not sure

4. **Do you generally agree or disagree with the following statements regarding vendor support for the system you use:**
   - It's easy to reach someone to discuss a particular problem or ask questions.
   - The people I've reached were able to solve my problem or answer my questions.
   - My questions or issues are resolved within an hour or two.
   - 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 hear from the vendor about pending updates to the system.
   - It is clear to me what is in an update.
   - Updates to the system are relevant to our needs.

5. **Do you agree or disagree with the following statements regarding the vendor's implementation of the system you use:**
   - I was provided a clear project plan that outlined the timeline and budget for the implementation.
   - 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 made during the sales process.
   - Small issues from implementation were resolved within a few days.
   - Larger issues from the implementation were resolved within 1-2 weeks.

6. **Do you agree or disagree with the following statements regarding the training offered by the vendor:**
   - Initial training was included in the cost of implementation.
   - 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 the training offered by the vendor is worth what we pay for it.

7. If using a hosted/online solution, about how often has there been a time when you couldn't access the system?

- Never
- 1-2 times a year
- 3-5 times a year
- 6-12 times a year
- 13+ times a year

APPENDIX D: ADDITIONAL RESOURCES

The following resources provide additional insight and information into emerging topics in philanthropy, software selection, and grants management.

AI and Grantmaking, *PEAK Grantmaking*
https://www.peakgrantmaking.org/news/how-todays-ai-could-change-the-grantmaking-of-tomorrow/

Blockchain and Philanthropy, *Tech Soup*
https://blog.techsoup.org/posts/the-current-state-of-blockchain-in-philanthropy

Courage in Practice: Five Principles for Peak Grantmaking, *PEAK Grantmaking*
https://www.peakgrantmaking.org/principles-for-peak-grantmaking/

Deciding Together: Shifting Power and Resources Through Participatory Grantmaking, *Foundation Center*
http://foundationcenter.issuelab.org/resource/deciding-together-shifting-power-and-resources-through-participatory-grantmaking.html

Digital Skillsets Briefing Paper, *Tech Impact Idealware*
https://www.idealware.org/reports/digital-skillsets-briefing-paper/

Diversity, Equity, and Inclusion: Building the Infrastructure for Diversity, Equity, and Inclusion (DEI) for the Nonprofit Sector, *Candid*
https://learn.guidestar.org/dei

Future-Proof Your Grantees: 10 Ways to Fund Nonprofits for Long-Term Success, *Tech Impact Idealware*
https://www.idealware.org/reports/fundersprimer/

How Much Does a Grants Management System Really Cost?, *Grantbook*
https://www.grantbook.org/blog/how-much-does-a-grants-management-system-really-cost

Investing in Impact Infrastructure, *TAG*
https://www.tagtech.org/page/impactinfrastructure

Risk Management Toolkit, *Open Road Alliance*
https://openroadalliance.org/resource/toolkit/

RFP Resources, *Tech Soup*
https://www.techsoup.org/support/articles-and-how-tos/rfp-library

Roll It Out Right! A Nonprofit Action Plan to Set Up Your New Software for Success (Recorded Training), *Tech Impact Idealware*
https://www.idealware.org/training/recording_implementation/

Strategic Software Selection for Nonprofits (Recorded Training), *Tech Impact Idealware*
https://www.idealware.org/training/recordingsoftwareselect19/

APPENDIX E: ABOUT THIS REPORT

Authors

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Amadie Hart is a contract writer and researcher for Tech Impact Idealware and President of Hart Strategic Marketing LLC. She has a wide range of experience helping nonprofits assess their needs, select software to meet them, and engage audiences and constituents. At Tech Impact Idealware she has extensively researched a wide range of topics from CRM to project management, and brings her experience and expertise with organizations of all sizes and missions to bear on our work.

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Contributors

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- Melissa Sines, *PEAK Grantmaking*
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- Kelly Brown, *Viewpoint Consulting*
- Cheryl Kaneshiro, *Hawaii Community Foundation*
- Tracy Lamparty, *The Jay & Rose Phillips Family Foundation of MN*
- Ann M. Puckett, *Grand Rapids Community Foundation*
- Martin Schneiderman, *Information Age Associates, Inc.*
- Brad Ward, *Council on Foundations*
- Laura Wiegand, *Texas Commission on the Arts*
- Maya Winkelstein, *Open Road Alliance*

About Tech Impact Idealware

Tech Impact is a nonprofit on a mission to empower communities and nonprofits to use technology to better serve the world. The organization is a leading provider of technology education and solutions for nonprofits and operates award-winning IT and customer experience training programs designed to help young adults launch their careers. Tech Impact offers a comprehensive suite of technology services that includes managed IT support, data and strategy services, telecommunications, and cloud computing integration and support. In 2018, it expanded its education and outreach capabilities by merging with Idealware, an authoritative source for independent, thoroughly researched technology resources for the social sector. Tech Impact's ITWorks and CXWorks training programs have graduated hundreds of young adults with the knowledge, skills and confidence they need to start their careers in the technology and customer experience industries. The organization also operates Punchcode, a coding bootcamp based in Las Vegas, NV.

Learn more at www.techimpact.org, and browse our archive of free reports, articles, and training resources at www.idealware.org.

About Grantbook

Grantbook is a rapidly growing technology consultancy helping grantmakers around the world plan, select, implement, and optimize their philanthropy tech. Over the course of eight years, and more than 200 digital transformation projects, Grantbook has helped hundreds of grantmakers reach the full potential of their people, process, and technology. Our team of thinkers and tinkerers operate at the intersections of philanthropy and technology, and strategy and execution. Currently, Grantbook—a certified B Corp—is exploring more ways to leverage tech to operationalize values of DEI, participatory grantmaking, and relationship-driven collaboration.

Learn more at grantbook.org.

About PEAK Grantmaking

Practice meets purpose at PEAK Grantmaking, a member-led national association of 4,500 professionals who specialize in grants management for funding organizations. Our members come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we champion grantmaking practices designed to help funders of every size and type maximize their mission-driven work through living their values.

Learn more at peakgrantmaking.org, contact us at info@peakgrantmaking.org, and follow @PEAKgrantmaking on Twitter.

TECHIMPACT® IDEALWARE℠ grantbook PEAK Grantmaking

About the Promotional Partners

We're grateful to the following promotional partners for helping us reach a wider audience of foundations and grantmakers.

Candid

Candid, formed by the 2019 joining of Foundation Center and GuideStar, connects people who want to change the world with the resources they need to do it. Learn more at candid.org.

TAG

The Technology Association of Grantmakers (TAG) is a 501(c)(3) nonprofit membership organization that promotes the strategic use of technology to advance the goals of the philanthropic sector. Learn more at www.tagtech.org.

The Chronicle of Philanthropy

From deeply reported stories on the big ideas that shape the work of charities and foundations to the guidance in its online resources and webinars, the Chronicle of Philanthropy provides nonprofit professionals, foundation executives, board members, and others with the indispensable information and practical advice they need to help them change the world. Learn more at www.philanthropy.com.