



# Consumers Guide to Integrated Systems for Community Foundations

October 2017

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# FOREWORD

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Dear Colleagues,

PEAK Grantmaking and Technology Affinity Group (TAG) greatly appreciate the work that community foundations do across the country. We also recognize the difficulties and intricacies that exist within this segment of the philanthropic sector. Regardless of the size of the organization, most community foundations are much more complex than their private foundation counterparts, having to provide donor services and manage multiple funds in addition to traditional grantmaking activities. It can be overwhelming, especially if not equipped with the right technology.

We are proud to sponsor this report, *Consumers Guide to Integrated Systems for Community Foundations*, created by Idealware. Technology can do so much, but selecting the right product is a pivotal part of ensuring your organization's overall effectiveness. Not only will this report help you analyze your needs, but it also will help you decide which solution may best serve them.

This guide covers a number of features and considerations, including: online applications, scholarships, donor portals, fund accounting, communications capabilities, support and training, and customer experience.

We realize that identifying and selecting a solution that meets all of your needs can be a daunting task and we hope this resource helps. We want to thank all the volunteers who contributed to the criteria development in this report. With so many potential options to consider, their help narrowing the scope was invaluable. We also thank the vendors for their time and contributions.

Special thanks to Idealware for their dedication in giving the clearest view possible of such a complex landscape. Again, it is our sincere hope that this guide will help you evaluate the technology that's available to you. We would appreciate hearing from you about the utility of this guide so we can have a continuing conversation on what is most important to you. We also look forward to bringing you more compelling and valuable products and resources like this in the future.

Best regards,

PEAK Grantmaking and Technology Affinity Group (TAG)

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# INTRODUCTION

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Community foundations operate quite differently than private foundations, and have a complex set of additional requirements to track their data. In addition to making grants, a typical community foundation also solicits donations, manages investments, acts as fiscal custodian for funds under advisement from donors, and awards scholarships. The experts we spoke to described community foundations as grantmakers, fundraisers and financial institutions all at once. Each of these roles requires something different of a foundation.

As grantmakers, community foundations need to track grant applications, review processes and make payments, like all foundations. But their assets are typically made up of dozens, or even hundreds, of different “funds” specifically earmarked by donors for a particular purpose. Each fund can have its own rules, restrictions, and reporting requirements. In a way, each fund can be viewed as a mini-foundation.

As fundraisers, community foundations have the same needs as any nonprofit dependent upon gifts. They need to be able to understand their relationships with prospects and donors, solicit them by mail and email, track complex gifts and grants, and understand what fund each gift should go toward. They’ll also act as fiscal custodians of individual “donor-advised funds” for major donors who want to commit to ongoing philanthropy. While the foundation has direct control over these assets, donors often expect to be able to easily check balances, view statements, deposit money and make grant recommendations for them—often online.

To complicate things further, the money under a community foundation’s management is often invested in a variety of investment vehicles, and the foundation must keep track of how the investment income affects each fund under its management.

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**Most of the systems we reviewed meet this complex set of needs by integrating an ensemble cast of software... into a single, comprehensive solution.**

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These requirements combine to make accounting particularly complex, as well. Community foundations need to track incoming gifts, outgoing grants and investment income for each of potentially hundreds of different funds, and to be able to see the balance of each more or less in real time. This feature makes data integration across the organization particularly desirable. If a foundation were to separate systems for fundraising, grants management, and fund accounting, integrating all the data for real-time fund balances would be extremely difficult.

With a small number of potential customers—there are only about 750 community foundations in the United States—and a complex set of requirements, only a few vendors provide solutions to address these particular needs.

We reviewed 29 different grants management systems for private foundations in 2016 for *A Consumers Guide to Grants Management Systems*, but only eight systems from six vendors met our requirements to qualify as solutions appropriate for community foundations

for this report. By necessity, these vendors provide more than just standalone grants management systems—they provide integrated ecosystems intended to support all aspects of community foundations’ work.

Most of the systems we reviewed meet this complex set of needs by integrating an ensemble cast of software, sometimes from different vendors, into a single, comprehensive solution. We compare them side by side in this report, evaluating each system by 199 criteria grouped into five broad categories chosen to determine how well the systems stacked up against the needs of community foundations.

- Grant and Application Management
- Financial Management
- Donor Management
- Relationship and Communication Management
- Technical Considerations

We also provide detailed summaries, a comparison chart, and extensive reviews of all eight systems. In addition, we’ll publish a *Vendor Product Update Supplement* every 12 months until the next edition of this report as a means of allowing participating vendors to share information about what’s been changed or added to their systems. If you registered with Idealware, TAG, or PEAK Grantmaking to download this report, we’ll notify you when these supplements are available.

## Selecting a System

Which solution should you use? With a small pool of vendors to choose from, it’s tempting to want to explore them all for your organization, but their complexity could make that an overwhelming task. Use this report to help you identify a few that are most likely to be a great fit for your needs and budget.

When trying to choose one of these systems, an important consideration is how much functionality is included out-of-the-box, and what functionality requires an additional module from the vendor or a third-party solution.

Some systems in this report (Bromelkamp Community Pearl, Foundant CommunitySuite, Stellar Technology Solutions iPhi Suite) provide almost everything out-of-the-box for the quoted price, with the exception of broadcast email, which requires a third-party solution such as MailChimp, Constant Contact, or VerticalResponse.

Others (Blackbaud’s FIMS, Financial Edge NXT, Raiser’s Edge NXT, and GiftingNetwork’s GiftingNet) rely on additional products from the same vendor. For example, the two Blackbaud solutions we review in this report need GIFTS Online to support online applications and Donor Central to support donor portals.

The remaining system (Fusion Labs GE Spectrum) requires third-party solutions to support financial management or donor management.

For more detail on what functionality is included with each system in this report, consult the pricing chart on page 25. To see which specific functionality requires additional modules or third-party software, see the What’s Included in These Systems chart on page 28 or check the detailed reviews of the systems starting on page 30.

Then, consider a few questions to help you decide:

- These systems aren’t cheap—do the higher end systems present a compelling return on investment for you?
- Do you need sophisticated fundraising functionality, or strong integrated broadcast email?
- Do you need a solution with robust fund accounting included, or are you satisfied with your current accounting system and want a solution that can integrate?
- And how important is it to provide your users with a polished and integrated user experience?

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# DO YOU NEED A COMMUNITY FOUNDATION SOLUTION?

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Many community foundations manage their processes with a set of un-integrated products—for example, a donor management system, a grants management system, and a separate accounting system. Does it make sense for to move to a specialized community foundation system instead?

The most compelling reasons to switch are the need to tightly integrate data, or to provide more support for donor-advised funds. For instance:

- Are you having trouble determining the balance of particular funds?
- Do you spend a substantial amount of time trying to get data from one system into another, especially for accounting purposes?

- Are major donors asking for online portal functionality that you can't provide, or can't provide easily, from your current setup?

If you answered yes to any of these questions, the solutions included in this report could be worth the investment. They all boast relatively seamless integration between different systems or modules to provide comprehensive accounting data. And all have integrated donor portals that can provide fund information approximately in real time.

If streamlined data access between different areas of functionality is important to you, you may find a system that fits your needs among those reviewed in this report.

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# WHAT DO COMMUNITY FOUNDATION SOLUTIONS DO?

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It's difficult to think about your own foundation's needs or evaluate the systems available to meet them without a solid understanding of what features are possible, and which are common.

Based on our interviews and our reviews, we learned that more is not always better—the right system for your organization is the one that best supports your needs, not necessarily the one with the most features. Feature-rich solutions can also be needlessly complex, and may present an unnecessarily high learning curve for your staff.

To better understand the functionality provided by integrated community foundation systems, we've grouped the features into five broad categories:

- *Grant and Application Management*, including online applications and review for competitive grants to nonprofits and scholarships for students.
- *Financial Management*, including fund and grant payment management and budgeting.
- *Donor Management*, including support for individual donations and online donor portals.
- *Relationship and Communication Management*, including support for letters, board dockets, and email to groups or individuals.
- *Technical Considerations*, which include reporting capabilities, user and permission management, data access, and overall customization.

Not all systems cover all of these categories. Many community foundations that find themselves looking for a new solution are really only seeking better support for one or two of these categories. Therefore, it's important to consider the specific functionality you need rather than searching for a solution that checks all the boxes.

We recommend using this section of the report to construct a list of the features that might be useful to your organization. From there, carefully prioritize the list to fit your specific needs.

## Grant and Application Management

The functionality in this section is of particular importance to community foundations that maintain a competitive grant program for nonprofit organizations in their area or offer scholarship programs for current or incoming college students.

### Online Applications

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

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

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

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

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

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

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

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

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

## Form Design and Flexibility

Online applications collect information from prospective grantees in online data fields like text boxes, 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, but only allow the use of their built-in spell-checkers. You should be able to set character limits for text fields in the system and be able to display prominently to applicants how many characters are left; ideally, you can display word counts, not just character counts. Most systems also let you customize in-application help for grantees, either through hover-over text, FAQs, or more innovative means, like videos.

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

## Application Review

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

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

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

Many systems allow reviewers to see and rate applications online. This allows internal staff to review applications from any location, and provides an opportunity for you to involve people from outside your organization as reviewers. If you do plan to include external reviewers, consider features that allow

you to manage this process in detail. Can reviewers choose which proposal to review, and easily see and print both the proposals and any attachments? Can they flag conflicts of interest—for example, if they work for the same university as a grant applicant? Can you match reviewers to proposals based on keywords, demographic data, or level of expertise, or see how the average scores of reviewers compare in order to identify those who will typically score proposals higher or lower? Can foundation staff be notified when reviews are completed, either by email or within the system?

## 501(c)(3) and OFAC Status

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

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

## Scholarships

Finally, consider whether your foundation needs specialized functionality to support scholarship processes—for example, to account for the volume

of applications or for specialized processes. Many of the systems simply support scholarships like any other competitive grant process, but a few provide specialized online interfaces geared to scholarship needs. Regardless of which interface applicants use to apply, make sure the system provides the functionality you need to easily review applications—for instance, do you need to allow external reviewers see applications?—and to track a scholarship either directly to individuals or to their academic institutions.

## Financial Management

All foundations—community or private—need financial assets to function. No matter if grants are awarded directly by donor request or if you have a competitive grant program, accounting and budgeting are essential to your work. Some systems will require you to use a third-party accounting system to manage your fund accounting, grant payments, budgeting needs, or even to add and track donations made to your foundation. Be sure to consider how important it is to have a specific functionality as a fully integrated part of the package or whether it makes more sense to keep them separate.

## Fund Management

The core of a community foundation's data management system is the ability to manage multiple funds—dozens or even hundreds of them. Each fund is a pool of money that often comes with different restrictions. For example, one fund may be income from a grant that can only be used for specific purposes, while another might be made up of donations from the community for a less-restricted “community building” fund. Many community foundations also allow philanthropic individuals to create a “donor-advised fund” from which they can then recommend grants. For each fund, the system must track incoming donations, outgoing grants and changes in income based on investments.

The core requirement in fund management is the ability to see the balance of any given fund in approximate real time. This feature is the primary driver behind the need for integrated systems for community foundations. If a foundation were to use one system for fundraising, another for grants management, and a third for fund accounting, it would be very difficult

to integrate all the data for real-time fund balances. When considering which system to use, think about what your donors might want to know about their fund balances. Most of the systems covered in this report allow foundation staff to distribute investment income to funds or update the value of a donor's investment portfolio as-needed, but this often requires a manual process—as a result, if you have frequent requests from multiple donors for up-to-date fund balances, you'll need to devote more staff time to handling those requests as opposed to working directly on programs. A few systems offer actual real-time fund balances, which can be automated, reducing staff time needed to check balances, or even allowing donors to view real-time values from the donor portal.

It's also important that the system be able to track information about each fund. For instance, what, if any, are the restrictions? Are there specific rules about how much should be paid out in grants for each fund, and will the system calculate the suggested annual payout based on those rules? Are there specific reporting requirements for the fund—has the donor requested a yearly summary rather than quarterly updates? It's also very useful for a grants manager to be able to easily look through the funds and restrictions to find a fund that might match well with a grant the foundation would like to make.

For many foundations, it's also important to be able to manage investment income by creating investment “pools” with money from a variety of funds. As fund assets can be part of many pools—and pools can contain many funds—straightforward functionality to associate investment income or losses to funds is often desirable. All the systems we reviewed will let you associate funds with one or multiple pools and allow you to define the proportion of the fund invested in each pool. Consider how foundation staff will update the funds with the income or losses based on a statement. Is that an easy process?

## Grant Payments

Once you approve a grant, you will need to manage the payment process. In many software packages, setting up a payment schedule for a grant mimics the process of setting up grant requirements. Some require you to schedule each payment manually, or automatically default to paying the entire grant in a

single lump sum on the established grant start date. Others allow you to set one or more default payment schedules, which you can then assign to a grant—for example, to say that every grant within a particular program is a three-year grant with a payment on the first of each year. Some systems also offer a payment scheduling “wizard” to distribute payments over time. However you initially define payment schedules, it’s useful to be able to then manually adjust them to specific circumstances for a particular grant.

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

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

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

Most of the systems covered in this report expect that foundations will use a third-party accounting system—most likely the one currently in use by the financial team—as their general ledger. If your

foundation is looking to upgrade from a system you’ve been using or the accounting and financial staff are satisfied with your existing general ledger, then it may make more sense to let staff use the accounting solution they’re already familiar with and focus on finding a grants management system that provides the application and review functionality you need and can integrate tightly with accounting. Such integration can streamline the payment process by transferring information about upcoming payments into the accounting system and then retrieving data on payments that have been made. We’ll discuss this in more detail in the Technical Considerations section, but different vendors may have different ideas of what counts as integration.

At a minimum, all the systems will allow you to manually export and import data between your accounting and grants management systems, but this is not “integration,” as it requires additional effort by your staff and limits how up-to-date the fund balances you provide donors can be. Instead, look for a system that provides an Application Programming Interface (API) that permits data to sync bi-directionally between your systems—that is, lets data flow both from the general ledger to the grants management system, and back—or a vendor who can build a custom connection for you.

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 to be accessible from the grantee portal. If so, can grantees view just the installments they have already received in the system, or can they view all scheduled and received payments?

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

## Budgeting

There is wide variance among grants management systems in how they provide for budgeting granting funds—a few offer no budget support at all, others allow budgeting only through heavy customization, and some include strong budgeting features.

Most commonly, budgeting features let you define the amount of money you plan to devote to each grant program or category and then generate reports to compare these budget amounts to the amount spent. More versatile systems allow you to track by both program and subprogram, or split grants between programs.

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

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

A number of grantmakers expressed interest in tracking budgets across multiple categories—for example, program, geography, and population—and "what if" scenario planning to see how a certain course of action would affect budgets. A few of the packages in this report provide some support for building "what if" scenarios.

## Donor Management

While private and corporate foundations typically have the benefit of large endowments to support their grants and operating costs, many community foundations are dependent on the funds they manage for major donors and the individual donations they may receive from fundraising campaigns. As a result, they must track not only money going out as awards, but also fundraising and donations. In addition to support for recording, tracking, and acknowledging donor contributions, you'll want to consider an online portal where donors can log in and check the balance of their fund(s), suggest awards to particular nonprofits, or even make deposits directly to a fund.

## Adding and Tracking Donations

Overall, software for community foundations doesn't typically offer the same level of functionality for adding and tracking individual donations as donor management systems designed for nonprofits with active individual fundraising campaigns. And for many community foundations, individual donations are less important to revenue than service fees on donor-advised funds. As a result, most of the systems in covered in this report rely on your foundation's existing accounting solution to record individual donations. If individual fundraising is part of your foundation's revenue, you'll want to consider how these systems support adding and tracking donations.

Among your first concerns is the ease with which you're able to enter gifts into the database. Can you easily search on important fields to see if the donor is already in the database to prevent adding another record for the same one (a duplicate)? Can you easily enter a lot of gifts in one sitting through a quick entry form, ideally, or an upload file?

In addition to cash in-hand donations, will your system support pledged gifts? Does the software make it easy to create a pledge schedule, modify it to suit your needs, or to log gifts against those pledges when the gift is made? Does it alert you to outstanding pledges, or do you need to track them yourself?

Consider how the system deals with other gift types. Can you log gifts from a company as opposed to individuals, and separate them out in reporting? Does the system support gifts "in honor of" someone, tribute gifts, stock gifts, or in-kind gifts (perhaps entered as a zero dollar donation)? Most systems claim to support each of these things, but their actual functionality varies widely. Every organization's needs differ. Define what you really need to track for each of these gift types, and see what each system offers for your specific needs.

All systems let you track things like the amount and date of a gift, but can you easily track the gift by a campaign, fund, or source, or split the gift in order to associate each piece with different ones? Can you log a "soft credit" for gifts that someone else in the database—say a board member—helped to bring in?

Can you enter freeform notes to refer to later? Can you track that part of their gift isn't tax deductible, because they received a "premium" (a thank you gift, like a T-shirt, that has value)?

Make sure the system lets you log and track the gift information that's important to you.

## Donor Portals

Community foundations are often in direct competition with investment brokerages for donor-advised funds. Brokerages typically offer convenience and additional services that community foundations often can't afford to provide. A donor portal that allows donors to view and manage their fund(s) online can make community foundations more attractive and competitive. At a minimum, an online donor portal should allow donors to view their current balance and grantmaking history, if not make a deposit or provide information about a grant they'd like to make. Foundations also frequently find it useful to be able to make a list of "approved" or "suggested" nonprofits available to donors to guide them toward organizations the foundation has worked with in the past.

## Relationship and Communication Management

In order to cultivate a strong relationship with donors and to support grantees and scholarship recipients, a community foundation needs up-to-date contact records. To what email or street address does that year-end tax receipt go? Does a donor spend different times of the year at different addresses, or not want to receive emails? What about communicating with grantees or donors—can you easily generate thank you letters, email alerts, or other forms of outreach? Will the system show you all the phone calls, emails, and letters you've had or sent to a particular person?

Keep in mind that while all the systems in this report can support tracking and managing your contacts and can send emails from the system to individuals, most will require a third-party broadcast email client to support emailing large groups of recipients.

## Relationship Management

During the course of a grant, grantees are likely to interact regularly with various people at your organization. Grants management systems can help track these interactions. What communications have you sent a grantee? Who have they spoken with, and about what? To do this effectively, a system must track organizations separately from individual grants—to allow you, for example, to see what conversations you had about a previous grant when a new one is under review. It can also be helpful to track the names and roles of individual staff members at a grantee organization. This is particularly important for large institutions such as universities, where different researchers may apply separately for grants.

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

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

## Letters and Board Dockets

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

Word's mail-merge functionality. As board dockets can be very lengthy documents spanning hundreds of pages, consider looking into what options the system provides for viewing these files electronically.

Few systems will provide specific formats for viewing and annotating board dockets from tablet devices, but almost all will allow you to at least save generated documents as a PDF file in the same format as print templates. Worth noting is that an entire separate class of software exists to enable the creation and viewing of electronic board documents. These board portal tools provide more functionality for comments and annotations on the docket than a standard .PDF and are designed specifically with tablets and other mobile devices in mind. (For more information about board portal software, download our free report, *A Consumers Guide to Board Portals*.)

## Email

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

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

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

Email delivery reports can be useful for grantmakers who intend to send bulk email from their grants management systems. A few solutions in this report offer email delivery reports, including open, click-through, and unsubscribe rates. Most do not. If your organization plans to send bulk email through its grants management system, you'll also want to consider how this email is sent. Some systems send out email through your own 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 means either choosing a system that allows that, or opting for a third party broadcast email tool. We also recommend steering clear of systems that send out group emails via blind copy rather than one-to-one, another spam trigger.

## Technical Considerations

It's essential that you can easily access and use the information stored in your system. Can staff generate reports on fundraising, grantmaking, or accounting data? What if, years down the road, you decide this solution isn't right for you—can you easily get your data out of the system and into a new one? If your foundation has particular needs, how much freedom do you have to configure or customize the solution to meet those needs? Finally, what level of support and training—whether at implementation or ongoing—does the vendor provide? Does this cost extra?

## System Querying and Reporting

System reports can help manage grants processes and provide updates to others. At a minimum, you should be able to create the basic reports you need to monitor your workflow, evaluate your practices, and report on your activities—for example, the amount of money

committed and paid for the year, sorted by program, or grant details for a Form 990. 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. Not all systems allow this. 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 ones?

A growing trend in the sector is opening up reporting access to casual users of the grants management system, not just experts. For that reason, we evaluated the approachability of the systems' reporting interface in this report. (For a list of the basic data you need to be able to get out of your system, and more useful information on reporting, download PEAK Grantmaking's free report, *Assessing the How of Grantmaking*.)

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

Reporting abilities in grants management systems are becoming more sophisticated, and many now offer the ability to automatically run reports and send them out at intervals you set, either to you or individuals you define, as well as to present information in visual forms like charts, graphs, and maps. Some systems also contain standard report templates, like the eGrant

and hGrants format from the Foundation Center, or the International Aid Transparency Initiative (IATI) standard. Dashboards are also becoming increasingly important, and some systems allow users to configure their own dynamic views of data.

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

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

## Permissions and Workflow

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

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

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

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

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

## Data Access

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

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

If you want a system to integrate with other software packages, such as a fund accounting system or Crystal Reports, so that data flows from one system to the next without manual intervention, check to see how the connection is configured. Is an Application Programming Interface (API) or Open Database Connectivity (ODBC) connection provided so your own programmer can configure it? What data can be accessed this way? Is it read-only, or does it let you write to the database? Some require the vendor to set up any integration with external packages for you—often at extra cost. While traditionally vendors in this space have been reluctant to allow clients this level of data access, over the past few years we’ve seen more systems permitting integration via an API, as well as vendors offering more robust APIs, including

those that can sync data bi-directionally, and one system covered in this report even provides a library of pre-configured integrations with multiple third-party solutions.

Increasingly, users want the ability to work from smartphones and tablets. While many web-based applications are accessible via smartphone web browsers, their screen size can make them impractical to use unless the vendor provides a view optimized for mobile browsers or builds a compact smartphone application, or “app,” to facilitate access. Using a web-based grants management system from tablets can be practical, even without a specialized app or mobile view, given their larger screen size relative to smartphones. Mobile device access is still new territory so it pays to get detailed information from the vendor if this is something that interests you.

Most of the web-based systems we reviewed have eschewed mobile apps in favor of “responsive” web design, which will automatically rearrange fields, forms, and sections of the user interface to match the size of each user’s screen. While this provides a convenient means of viewing grant records from a smartphone or tablet, it may not provide the ideal environment for filling out forms or answering questions with radio buttons or checkboxes.

As a result, if it’s important to you that reviewers can easily rate grant applications from mobile devices, look for systems that can provide a dedicated mobile interface for those use cases.

## Overall Customization

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

But the differences among the systems become more apparent when you begin to consider their ability to add custom “internal tracking” fields 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 them. Check to see if you can remove fields or change the names of existing ones, and if custom fields have the same permissions as system-generated ones.

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

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

## Ease of Use

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

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

## Support and Training

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

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

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

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

## Installation and Maintenance

It is important to know what will be required to use the system you choose. For most online hosted systems, a major web browser and sufficient bandwidth is likely enough. For installed systems and for web-based systems you host yourself, there can be many other requirements. You will want to know what kind of server hardware you will need. Additionally, there will likely be software prerequisites, like web server software and a core database like SQL or Microsoft Access, and you may need to increase bandwidth to

accommodate access to Cloud-based grants management systems. Will the vendor help with setup and maintenance? If not, then you might need to hire a consultant to assist you.

## Stability in the Market

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

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

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# WHAT KINDS OF SYSTEMS ARE AVAILABLE?

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While all the systems in this report are geared toward bringing all the functionality a community foundation needs to support the organization and its programs into a central solution, the direction vendors take to reach that goal can vary greatly.

Overall, there are two different approaches, each at opposite ends of a spectrum. On one side are “suites” in which the vendor provides all needed components and functionality, either in a single product or a collection of tightly-integrated solutions. On the other, solutions that integrate with individual components from different third-party vendors into a single, highly customizable platform, like Salesforce. This is not formal, industry-standard terminology, but it is a useful way to think about these systems and the different ways they meet your needs.

The first approach is attractive to foundations that don't have a lot of time or resources to spend on software selection or implementation, or to support and train their staff themselves. With all components provided by one company, you don't have to search to find the right tool for applications, accounting, email, etc., and you can confidently assume that all the pieces will work together as intended. The vendor also typically performs the installation and initial setup. If a user needs assistance performing certain tasks, or if a feature doesn't work correctly, you only need to contact one vendor for assistance.

However, the suite approach to software often comes with a hefty price tag, and while all needs are catered to by a single vendor, the individual functionality for a particular need might not be the strongest available.

The second approach is attractive to foundations that want access to the most robust, feature-rich solutions available, while keeping all data in a centralized data-

base. This “component” approach also has the potential to save money in licensing costs, as an individual broadcast email client, for example, may be cheaper in the long run than the email module provided by a “suite” vendor. Because each component is easily separable from the central database, this approach also means that your foundation can upgrade individual functionality without requiring a whole new system.

However, because you don't have a single vendor to rely on for setup and support, you'll either need to implement the solution yourself or contract someone to implement for you. Furthermore, since each component comes from a different company, with its own support and training, it can be more time-intensive to train staff, and harder to resolve technical issues.

In practice, most of the systems covered in this report fall somewhere between these two approaches. Suite solutions may provide all the functionality needed for grant applications and financial management, but may require a third-party broadcast email client to send email to your entire list at once.

For more detail on what functionality is included with each system in this report, consult the quick reference chart on page 28. To see which specific functionality requires additional modules or third-party software, check the detailed reviews of the systems starting on page 30.

As you compare options for your own organization, take care to think through what functionality needs to be integrated and how much you're willing to spend each year.

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# SYSTEM OVERVIEWS

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You'll find pricing and comparison charts beginning on page 24, and detailed reviews of all the systems beginning on page 30. In general, what do the available packages offer?

## **Blackbaud FIMS (with GIFTS Online and Raiser's Edge NXT)**

Long the standard solution for community foundations, MicroEdge FIMS—now a part of Blackbaud's product suite—provides robust fund accounting. Prior FIMS users will notice some changes since the product was acquired by Blackbaud in 2014. Online applications now make use of GIFTS Online's form builder and application review functionality, relationship management and fundraising functionality are provided by The Raiser's Edge NXT, and the donor portal is supported by Donor Central (donors can make deposits directly to their fund(s) through the donor portal if using Blackbaud's Online Express solution). There are some limitations, however. For example, novice users may have some difficulty navigating the FIMS interface, as they'll need to navigate between tabs within records in order to see all relevant information. While the system provides a good deal of configuration, particularly in GIFTS Online and The Raiser's Edge NXT, customization options within FIMS itself—for example, an API to build custom data feeds—are more limited than in other systems. Pricing for the system, including GIFTS Online to support grant applications and review, could start as low as \$17,000 in the first year for a smaller foundation with five users.

## **Blackbaud Financial Edge NXT and The Raiser's Edge NXT (with GIFTS Online)**

The second solution for community foundations from Blackbaud implements Financial Edge NXT and The Raiser's Edge NXT together for a strong, integrated back-office solution for financial management, donor

management, and relationship and communications management. Grants and application management can be provided by Blackbaud's GIFTS Online, Fusion Labs' GE Spectrum, or a third-party system—for this report, we've reviewed this solution integrated with GIFTS Online. Each system provides two user interfaces: the updated web view interface, where most users will view fund or donor records, record notes on calls or meetings, and enter new donations; and the classic dashboard view (familiar to those users with experience in earlier editions of the systems), where users can create new funds, accounts, or advanced reports. Reporting is strong in both Financial Edge and The Raiser's Edge, with a useful collection of pre-packaged reports for both fundraising and financial management. The Insights and Dashboard modules, currently in beta, provide a more user-friendly reporting experience in the web view. However, the integration between the systems is not seamless, and currently fundraising reports can only be run in The Raiser's Edge and financial reports in Financial Edge. Additionally, there's currently no automatic exchange of grant and application data from GIFTS Online to the systems—you'll need to manually import and export data between that system and the back-end, or pay for third-party integration—but the vendor reports that this is on the product roadmap. As a result, some information—such as fund restrictions, spending policy, or reporting schedules—must be tracked in Financial Edge as custom fields or notes. Overall, while Blackbaud's other offering, FIMS, is best suited for community foundations that need strong functionality for managing endowments or that need to be able to unitize investments, this solution may be a stronger option for foundations with substantial development or prospecting needs and those where grant officers, development staff, and the accounting team work more independently. Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.

## Bromelkamp Community Akoya.net

Built on Microsoft's Dynamics CRM platform, Community Akoya.net is Bromelkamp's newest offering for community foundations. The system leverages Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, Community Pearl, Community Akoya.net relies on Bromelkamp's eGrant.net module to support online applications for competitive grants and scholarships, as well as application review, at additional cost. Integration with the included Intacct Accounting provides solid support for grant payments and program budgets within the system, but staff members will need to manually record investment income for funds. The FundWeb.net module lets donors easily manage their funds online—while donors cannot directly make online deposits to their funds, the portal can link to the foundation's donation page. Reporting functionality is solid, with a good selection of pre-packaged reports for donor management and fundraising, and the Dynamics platform offers a good range of customization that can be performed by a foundation. Pricing for the system is determined by number of users—a smaller foundation with five named users and the optional eGrant.net module could expect to pay around \$53,000 in the first year, with recurring annual costs of \$23,000.

## Bromelkamp Community Pearl

Community Pearl is a traditional, installed software package built in Microsoft Access, which is both a strength and a weakness. On one hand, Access includes a solid report builder, is strong in data tracking, and provides a flexible database platform—which Bromelkamp uses to tailor Community Pearl to each client's needs, including adding fields or features to support unique processes. Someone with Access development experience can extend the system's functionality with minimal or no vendor assistance. On the other hand, Access has limitations in user interface design options, which shows itself in Community Pearl through screens that, while feature-rich, can feel crowded and hard to navigate. Like Community Akoya.net, Community Pearl relies on Bromelkamp's eGrant.net module to support online applications for competitive grants and scholarships as well as

application review, at additional cost. Community foundations that actively fundraise from individual donors may find the fundraising functionality lacking. Pledge installments must be scheduled manually, and staff must run a report to see pledges that are due soon, but donors can make deposits to their fund(s) directly from the donor portal. Pricing for the system is determined by number of users—a smaller foundation with five named users and the optional eGrant.net module could expect to pay around \$80,000 in the first year, with recurring annual costs of \$9,000.

## Foundant CommunitySuite (with Grant Lifecycle Manager)

Launched in 2016 following the acquisition of Small-dog Net Solutions, Foundant Technology's Community Suite makes use of Smalldog's fund accounting functionality, and when paired with Foundant's Grant Lifecycle Manager, offers a solid and affordable solution for community foundations. Easy-to-update online forms let you collect online grant applications, feedback from external reviews, and online progress reports from grantees, but the system doesn't support branching for applications or data collection. While the included donor portal doesn't let donors or fund advisors make online gifts or deposits to their fund(s), the "Grant Catalog" feature allows a foundation to publish grant proposals as crowdfunding projects, letting donors or the general public donate to fund potential grants. Options for printed materials are somewhat limited. Users don't have the ability to customize the format of printed grant applications, and if you want to email groups of donors or grantees, you'll need a third-party broadcast email client (at additional cost). While not as polished as other systems, Community Suite is easy for novice users to navigate and use, and will be of particular interest to smaller community foundations. Pricing for the system could start as low as \$15,000 in the first year for a smaller foundation, including Grant Lifecycle Manager to support online applications.

## Fusion Labs GE Spectrum

The standalone Fusion Labs GE Spectrum includes several facets, including the GrantedGE grants management system and either the vendor's native Spectrum online web portal or the PROFFER online

application management (which integrates with Blackbaud's NetCommunity). The system tightly integrates with other Blackbaud products, too, such as Raiser's Edge to provide fundraising functionality, and Financial Edge to support fund management, grant payments, and budgeting. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Lab's online form modules support reasonably sophisticated formatting of forms, including application branching, eligibility quizzes, and support for multiple logons for applicants from a single organization. Donors and fund advisors have the ability to donate or make deposits to their fund(s) online via the donor portal, and can view grant opportunities that match their personal interests or other criteria. Pricing for the system is determined on client-by-client basis, but the vendor reports that smaller foundations could expect to pay around \$16,000 in the first year for the installed system, or around \$7,500 per year for the hosted system.

### GiftgivingNetwork GiftgivingNet

GiftgivingNetwork's GiftgivingNet, the successor to ChesterCAP DOTCHE, provides solid online application support and strong fund management, and will be of particular interest to foundations that currently use FIMS for back-office accounting. The optional Philanthropic Back Office (PBO) automatically provides daily valuations of investment pools, allowing foundations to provide up-to-date fund balances for donors and fund advisors. Online applications for both competitive grants and scholarships are built with responsive design, making it easier for applicants to fill out forms from a mobile device, while the Charitable Catalog allows grantees to use a single account to apply to grants from any foundation using the system. Support for managing grant payments, program budgets, or adding donations depends on a third-party accounting system—the vendor provides bi-directional APIs to tightly integrate the system with fund accounting systems, including Blackbaud's FIMS and FoundationPower, among others. Pricing for the base GiftgivingNet platform is on the lower end of systems in this report, at \$995 per month (\$11,940

per year). Pricing for the optional Philanthropic Back Office is a custom quote based on foundation assets, and includes GiftgivingNet.

### Stellar Technology Solutions iPhi Suite

Stellar Technology Solutions' iPhi suite provides robust functionality for community foundations within a central, integrated suite of components. The applicant and donor portals support access from such mobile devices as smartphones or tablets through a dedicated mobile-friendly interface, which can be toggled on and off. Fund management is especially strong—iPhi is one of the few systems in this report that automatically provides daily valuations of investments pools, and investment income can be distributed to funds automatically. The fundraising functionality, however, may not be the best fit for foundations actively raising donations from individual donors. Pledge installments must be scheduled manually, and staff need to run a report to see pledges that are due soon. But donors can make single or recurring deposits to their fund(s) directly from the donor portal, and the system provides useful donor cultivation features beyond the scope of this report. Relationship management and support for letters or other print communication is solid, but you'll need to find a third-party broadcast email client to support any email marketing efforts. Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.

**Note:** We initially reviewed a ninth system, Social Solutions' Apricot for Funders, but ultimately decided that it did not meet our eligibility requirements for inclusion in this report. You can read more about it in our Research Methodology section on Page 112.

# HOW DO THE SYSTEMS COMPARE?

How do the available packages compare? We evaluated each system against 199 criteria that represent the needs of most community foundations. This comparison chart summarizes the categories into which those criteria fall. The details of how each system supported the full list of criteria can be found in the detailed reviews starting on page 30.

	Blackbaud FIMS (with GIFTS Online)	Blackbaud FE NXT & The RE NXT (with GIFTS Online)	Bromelkamp Community Akoya.net	Bromelkamp Community Pearl	Foundant CommunitySuite (w/ Grant Life-cycle Manager)	Fusion Labs GE Spectrum	GiftingNetwork GiftingNet	Stellar Technology Solutions iPhi Suite
Online Applications–Grantmaker Experience	●*	●*	○	○	○	●	○	●**
Online Applications–Grantseeker Experience	●*	●*	●	●	○	○	○	○
Form Design & Flexibility	○*	○*	○	○	○	○	○	○
Application Review	●*	●*	●	●	○	●	○	○
501(c)(3) and OFAC Status	●*	●*	○	○	○	○	●	●
Scholarships	●*	●*	●	●	●	●	●	●
Fund Management	○	○	○	○	○	○	●*	●
Grant Payments	○	○*	●**	●*	○	○	•	○
Budgeting	●	●	●	○	○	○	•	●
Adding and Tracking Donations	●*	●*	○	○	○	○	○	○
Donor Portal	○*	○*	○	○	○	●	●	●
Relationship Management	●*	●*	●	○	○	○	○	○
Letters and Board Dockets	○	●*	○	○	○	●	○	○
Emails	○*	○	●*	○*	○	●*	●*	○
System Querying and Reporting	○	○	●	○	○	○	○	○
Permissions & Workflow	○	○	●	○	○	○**	●	○
Data Access	○	●	●	●	○	●	●	●
Overall Customization	○	●	●	○	○	○	●	●
Ease of Use	○	●	○	○	○	○	●	○
Support & Training	●	●	●	●	●	●	●	●
Stability in the Market	○	○	○	●	○	●	○	●
Customer Experience with Training	○	•	○	○	●	○	•	○
Customer Experience with Implementation	○	•	○	○	●	○	•	○
Customer Experience with Support	○	•	○	○	●	○	•	○

• None ○ Basic ○ Solid ● Advanced

\*with module or app at additional cost

\*\*with customization

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# WHAT DO THESE SYSTEMS COST?

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Price should not be the only criteria by which you select a system, but it is an important one. The chart on the next pages summarizes the cost for the systems we reviewed. For many systems, pricing is determined by your foundation's asset base, the number of transactions or funds managed, the number of people using the system, and the optional functionality or modules you may need. As a result, price quotes for even a single system will vary widely depending on your particular needs.

In order to provide a baseline for how much your foundation could expect to pay for each system, we asked to vendors to provide price quotes for two hypothetical organization—one somewhat small, and the other much larger.

Pricing is based on the following models:

- *Small Organizations*: Five named users, five concurrent users, 50 external reviewers, \$10 million asset base, \$1 million awarded per year.
- *Large Organizations*: 20 named users, 10 concurrent users, 50 external reviewers, \$500 million asset base, \$10 million awarded per year.

In addition, we asked vendors to provide price quotes for licensing just the core system itself, without any optional features, and for a full implementation inclusive of all modules.

Licensing is not the only cost to consider when choosing a new system for your community foundation. You also need to think about implementation costs. These systems aren't necessarily "turn-key" or "plug-and-play" solutions—it can take one to two years to complete converting and migrating the data from your previous database(s), building out or configuring the system for your unique needs, and training staff on using the system. You'll work with the vendor to determine how much set-up is required, and the duration and cost of the implementation process.

Finally, most of the systems will require some additional costs to meet all the functionality covered in this report—like a third-party broadcast email client, for example. These potential costs are listed at the bottom of the chart.

Kind in mind that the quotes listed below are approximate prices, based on a "typical" implementation. Your quote may vary depending on your organization's unique needs and requirements. As always, consult the vendor for an individualized price quote.

	Blackbaud FIMS (with GIFTS Online)*	Blackbaud Financial Edge NXT & The Raiser's Edge NXT (with GIFTS Online)	Bromelkamp Community Akoya.net	Bromelkamp Community Pearl*	Foundant CommunitySuite (with Grant Life-cycle Manager)*	Fusion Labs GE Spectrum (Hosted)*	Fusion Labs GE Spectrum (Installed)*	GiftingNetwork GiftingNet*	Stellar Technology Solutions iPhi Suite*
<b>Small Org: Five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year.</b>									
Base licensing cost for system (bare minimum):	\$9,000 - \$14,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$38,000	\$66,000	\$12,000	\$7,500	\$16,000	\$11,940	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Annual Recurring cost (bare minimum):	\$7,000 – \$12,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$23,000	\$9,000	\$6,000	\$7,500	\$4,000	\$11,940	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Licensing plus all available functionality included:	\$9,000 - \$14,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$60,000	\$88,000	\$33,000	\$7,500	\$16,000	Custom quote based on foundation assets	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Annual Recurring cost (all functionality):	\$7,000 – \$12,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$25,500	\$11,500	\$21,000	\$7,500	\$4,000	Custom quote based on foundation assets	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
<b>Large Org: Twenty named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year.</b>									
Base licensing cost for system (bare minimum):	\$9,000 - \$14,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$78,000	\$86,750	\$35,000	\$30,000	\$64,000	\$11,940	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Annual Recurring cost (bare minimum):	\$7,000 – \$12,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$58,500	\$10,000	\$18,000	\$30,000	\$16,000	\$11,940	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Licensing plus all available functionality included:	\$100,000 - \$135,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$95,000	\$110,000	\$96,000	\$30,000	\$64,000	Custom quote based on foundation assets	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
Annual Recurring cost (all functionality):	\$80,000 - \$100,000	Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.	\$61,000	\$12,500	\$61,000	\$30,000	\$16,000	Custom quote based on foundation assets	Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.

\*Additional costs required for full functionality. See page 27 for more details.

<b>Additional Costs</b>	
<b>Blackbaud FIMS</b>	Grant and Application Management requires Blackbaud GIFTS Online, or third-party solution, at additional cost. Broadcast email functionality not included; requires Blackbaud Online Express or NetCommunity, or third-party solution, at additional cost. Donor portal functionality requires Blackbaud's DonorCentral, at additional cost.
<b>Blackbaud The Raiser's Edge and Financial Edge NXT</b>	Grant and Application Management requires Blackbaud GIFTS Online, or third-party solution, at additional cost. Donor portal functionality requires Blackbaud's DonorCentral, at additional cost.
<b>Bromelkamp Community Akoya.net</b>	
<b>Bromelkamp Community Pearl</b>	Broadcast email functionality not included: requires a third-party tool at additional cost.
<b>Foundant CommunitySuite (with Grants Lifecycle Manager)</b>	Broadcast email functionality not included: requires a third-party tool at additional cost.
<b>Fusion Labs GE Spectrum (Hosted)</b>	Accounting and donor management functionality require third-party solutions, Blackbaud's Raiser's Edge and Financial Edge, at additional cost.
<b>Fusion Labs GE Spectrum (Installed)</b>	Accounting and donor management functionality require third-party solutions, Blackbaud's Raiser's Edge and Financial Edge, at additional cost.
<b>GiftingNetwork GiftingNet</b>	Accounting functionality is managed by the vendor as a service. Can license the vendor's accounting solution at additional cost, or integrate with a third-party solution. Broadcast email functionality not included: requires a third-party tool at additional cost.
<b>Stellar Technology Solutions iPhi Suite</b>	Broadcast email functionality not included: requires a third-party tool at additional cost.

# WHAT'S INCLUDED IN THESE SYSTEMS?

As you can see from this chart, all eight systems need at least one additional component (possibly provided by the vendor) to meet four of the five primary categories covered in this report. Before selecting a system, consider how important it is to have a specific functionality as a fully integrated part of the package or whether it makes more sense to keep them separate. Pay particular attention to your community foundation's needs, and make sure to seek input from all the staff members who will be using the system.

	BlackBaud FIMS (with GIFTS Online)	Blackbaud FE NXT & The RE NXT (with GIFTS Online)	Bromelkamp Community Akoya.net	Bromelkamp Community Pearl	Foundant CommunitySuite (with Grant Lifecycle Manager)	Fusion Labs GE Spectrum	GiftingNetwork GiftingNet	Stellar Technology Solutions iPhi Suite
<b>Grant and Application Management</b>	Needs additional module	Needs additional module	Needs additional module	Needs additional module	Needs additional module	Included	Included	Included
<b>Financial Management</b>	Included	Included	Included	Included	Included	Needs third-party system	Needs additional module	Included
<b>Donor Management</b>	Needs additional module	Included	Included	Included	Included	Needs third-party system	Needs additional module	Included
<b>Relationship &amp; Communications Management</b>	Needs third-party email client	Included	Included	Needs third-party email client	Needs third-party email client	Needs third-party email client	Needs third-party email client	Needs third-party email client
<b>Technical Considerations</b>	Included	Included	Included	Included	Included	Included	Included	Included

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# HOW DO YOU DECIDE?

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With so few vendors to choose from in this space, it's tempting to just explore all eight of the systems in this report. If you're looking to streamline the selection process and want to narrow down your choices, we recommend asking the following questions to focus in on the packages likely to work best for you:

- **What can you afford?** These systems are not inexpensive. Do the higher-end systems provide compelling benefits to justify the additional cost, or just bells and whistles that don't meet more of your particular needs? Make sure you factor in all the costs of the components you'll need, not just the core system.
- **How substantial are your fundraising and communication needs?** One of the major differentiators between these systems is the extent of functionality to manage relationships, add and track more specialized donations, and create email or printed communications, all functionality that dictates how sophisticated your fundraising efforts can be. On the other hand, if you have very sophisticated fundraising needs, can you manage most of the process in a different system and simply enter gifts into a specialized community foundation solution?
- **Is an integrated experience a critical factor?** A number of these systems integrate multiple modules, or even products from multiple vendors, into a suite of tools—with substantially varying levels of success at making them feel like one integrated whole. Do you have tech savvy professionals managing your data who can easily overcome interface challenges? Or is ease-of-use and clarity-of-design a major factor in making sure your staff will be able to use the system?

Once you've narrowed down the options to two or three choices, take a closer look at those systems. Think through your needs carefully. Which of the features described here are critical for you? Which are nice to have but not necessary for your organization? What features beyond what we cover here might be useful to you?

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

Based on what you learn in the demos, rule out any systems that don't meet your basic needs, and ask vendors of those that remain for pricing information. For some systems, pricing is straightforward. For others, it's quite complicated, and may take some time for the vendor to estimate. Make sure you know what is included in the price. Will the vendor move any existing data into the system? Set up the system for you? Do more complex customizations?

There's much to consider when choosing such a system. Each of the available options has its own strengths and feature mixes, and cost isn't a guarantee of anything—especially since every foundation's needs differ. But if you do your homework and compare what's available with an honest evaluation of what you need, your reward will be a system that will help you manage all your data more efficiently and effectively.

# **DETAILED SYSTEM REVIEWS**

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# BLACKBAUD FIMS (WITH GIFTS ONLINE)

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Long the standard solution for community foundations, MicroEdge FIMS—now a part of Blackbaud’s product suite—provides robust fund accounting. Prior FIMS users will notice some changes since the product was acquired by Blackbaud in 2014. Online applications now make use of GIFTS Online’s form builder and application review functionality, relationship management and fundraising functionality are provided by The Raiser’s Edge NXT, and the donor portal is supported by Donor Central (donors can make deposits directly to their fund(s) through the donor portal if using Blackbaud’s Online Express solution). There are some limitations, however. For example, novice users may have some difficulty navigating the FIMS interface, as they’ll need to navigate between tabs within records in order to see all relevant information. While the system provides a good deal of configuration, particularly in GIFTS Online and The Raiser’s Edge NXT, customization options within FIMS itself—for example, an API to build custom data feeds—are more limited than in other systems. Pricing for the system, including GIFTS Online to support grant applications and review, could start as low as \$17,000 in the first year for a smaller foundation with five users.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$9,000 - \$14,000
- **Annual Recurring cost (bare minimum):** \$7,000 – \$12,000
- **Licensing plus all available functionality included:** \$9,000 - \$14,000
- **Annual Recurring cost (all functionality):** \$7,000 – \$12,000

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$9,000 - \$14,000
- **Annual Recurring cost (bare minimum):** \$7,000 – \$12,000
- **Licensing plus all available functionality included:** \$100,000 - \$135,000
- **Annual Recurring cost (all functionality):** \$80,000 - \$100,000

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are provided by Blackbaud’s grant management system, GIFTS Online, included in the price quote for this system.
- **Support for Both Individual Applicants and Organizations:** The system allows both individuals and organizations to apply for grants from the same grant program. The vendor has added substantial support for scholarships beyond the scope of this review.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** The system allows for eligibility quizzes that can branch to multiple applications.
- **Application Branching:** Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations vs. 501(c)(3) organizations.

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

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. The system includes the ability to do advanced online form design, such as HTML, columns, and vanity URLs.

- **Character and Word Counts:** The system includes word counts for application questions, which can be set and adjusted by a staff user for any field, but does not include character counts.
- **In-System Help for Applicants:** Online help text for applicants is available within the system and can be easily customized through a WYSIWIG editor for different application forms.

## Application Review

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

## 501(c)(3) and OFAC Status

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

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are provided by Blackbaud's grant management system, GIFTS Online, included in the price quote for this system.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported within the core system itself.
- **Creating New Funds:** Lets the grant manager easily create a new fund by generating a Fund ID, associating the fund with a general ledger account, and defining the fund class.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) which are then enforced by the system.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the percentage and cash value of fund investment in each pool, through the integrated back-office accounting software.
- **Investment Quick Entry:** Allows a foundation staff person to run an allocation report which calculates the amount of investment income to allocate per fund, and automatically distribute those allocations.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number.

- **Accounting Integration:** Includes a robust, integrated accounting package.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support:** Only supports grants in a single currency per account.
- **Multi-Currency Reporting:** Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting:** Lets you report on payments which carries coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues:** The system supports the ability to void payments, make refunds, place payments on hold, update payment details, create payments, track quid pro quo and in kind payments. Placing payments on hold and creating payments can be done in batch.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** Budgeting features are designed to track only the amount awarded in a particular year, and not the total amount paid out in a year.
- **Budget Amount Reporting:** Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Does not let you base current years' budget on the previous year.
- **Multiple Programs Per Grant:** Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting:** Does not easily let you set up multi-year budgeting.
- **Drafting Budgets for “What-If” Scenarios:** Lets you set up “what-if” scenarios.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported within the core system itself.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system notifies you that a pledge exists.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified or you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.

- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts, through the Securities module, at additional cost.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

## Donor Portal

- **Overall Approach to Donor Portal:** Donor portal functionality is supported by a separate product, Donor Central, at additional cost.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal. This requires the integrated Online Express module, at additional cost. The vendor reports that this functionality will be available through Donor Central as of November 2017.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of “approved nonprofits.”
- **Grant Recommendations:** Lets donors search for giving opportunities and suggest grants, but can’t filter or match by a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship management is supported by integrating with Blackbaud’s The Raiser’s Edge NXT, included in the price quote for this system, or within FIMS itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact?:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Tracking Individual History:** Lets you keep a record of an individual’s association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.

- **Customized communication:** Can set send criteria to communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact).
- **Record of Correspondence:** Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging:** Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture:** Does not currently let you capture emails from an external email system automatically. A plug-in is available to automatically capture emails and attachments from Outlook into the GIFTS Online grantmaking system.
- **Contact Synchronization:** Plug-ins are available to automatically synchronize contacts with Outlook.

## Letters and Board Dockets

- **Overall Approach to Print Communication:** Letters and Board Dockets are supported within the core system itself.
- **Default Print Format:** Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors and logos.
- **Mail-Merge Fields in Letter Templates:** Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors and logos.
- **Printing Series of Summaries:** Lets you print letters or summaries for a series of grants or grant applications in a single step
- **Pre-Print Viewing and Customization:** Lets you view and customize individual letters before printing them.
- **Board Docket Attachments:** Does not let you attach documents the board docket.
- **Electronic Signatures:** The system supports electronic signatures with an external approval process.
- **Electronic Templates:** Lets users define templates for print and electronic formats.

## Emails

- **Overall Approach to Email Communication:** Email is supported through Blackbaud's Online Express module, included as part of the Raiser's Edge NXT.
- **Emailing Individuals and Groups:** Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility:** Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments:** Lets you attach files to emails sent to individuals, but not groups.
- **Email Delivery Reporting:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email:** Lets you set up and send scheduled reminder emails to applicants and grantees, if using Online Express or GIFTS Online.
- **Outbound Email Method:** Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking:** The system relies on the browser's built-in spell-check functionality.

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program and cycle, and

view pre-packaged reports based on this customized set of grants.

- **Report Modification:** Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Fund Statements:** Lets you easily generate fund statements using pre-packaged templates.
- **Donor Management Reports:** The system provides pre-packaged standard reports for common fundraising and donor management needs.
- **Favorite Reports, Queries, and Actions:** Cannot quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports:** Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting:** Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking:** Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability:** Virtually all system data—including data entered into online applications, review forms and grantee progress reports—can be included in reports.
- **Report Drill-Down:** Lets you drill down for more information on some or all reports.
- **Attachment Searching:** Does not let you search within attached documents.
- **Automating Reports:** Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports:** Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards:** Users can configure the included data grid feature to provide “dashboard” views that summarize the grants currently relevant to them.
- **Industry-Standard Reporting Templates:** The system contains report templates to easily align data with the Foundation Center eReporting Excel format. GIFTS Online provides report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, or the Columbus Survey.

## Roles and Permissions

- **Permissions Granularity:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions:** It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** Does not provide a simpler interface for users with less-complex needs.
- **Audit Logging:** Records the majority of data updates, along with the data and the user who made the update, in an audit log, but this must be configured on a field by field basis.
- **User Dashboards:** Users can configure the included data grid feature to provide “dashboard” views that summarize the grants currently relevant to them.
- **Users Task Lists:** Provides users a “task list” when they sign onto the system.
- **Task Assignment:** You can assign tasks, such as reviews, to other users.
- **Board/Management View:** Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment:** Does not assign tasks to users based on rules and roles.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

- **Custom Data Feeds:** The vendor provides an Application Programming Interface (API) for GIFTS Online and The Raiser's Edge NXT to allow a programmer to create custom data feeds to or from an external system, but not for FIMS itself.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with DonorCentral.
- **Mobile Device Application Review:** GIFTS Online provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device:** GIFTS Online provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity:** The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for most fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields:** The system includes unlimited custom fields and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms,
- **Vendor Customization:** Vendor will not customize the system to your needs.
- **System Extendability:** Vendor permits clients to extend system functionality for GIFTS Online and The Raiser'sEdge NXT via access to underlying database and code (as allowed through the API), but not for FIMS.
- **Support for Customized Systems:** Vendor excludes extensively customized systems from the upgrade path.
- **Support for Multiple Languages:** Does not let you define custom language sets based on user, group, or giving program. Online application forms can be defined in multiple languages.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

- **Interface Layout:** The interface is not as polished looking as some systems, but the interface is clean and fields are neatly laid out.
- **Intuitive Labels:** The labels for navigation and action items are not always intuitive, meaning that many users will require training specific to the system in order to effectively understand them.
- **Easily Taking Action:** On the core interface pages, the user can easily find the actions he or she is most likely to take.
- **Optimization for Experts:** The system pulls together the information and actions an expert user is likely to need so as to minimize the number of steps and clicks they need to take.

## Support and Training

- **Phone Support:** Vendor provides unlimited phone support without additional cost.
- **Online Support:** Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation:** Vendor provides an online knowledgebase with user manuals, articles, and on-demand videos with step-by-step instructions.

- **Training:** The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled. In-person training sessions can be scheduled at additional cost.
- **User Support Forums:** There are user support forums or discussion groups available in the online knowledgebase provided by the vendor.

## Installation and Maintenance

- **Installation and Maintenance:** Online access to the system requires Citrix Receiver for Windows 4.6, supported by Windows Vista or later. (<http://docs.citrix.com/en-us/receiver/windows/4-6/system-requirements.html>)

## Stability in the Market

- **History:** The vendor has been in business since 1981; FIMS has been in use by clients since 1992.
- **Client Base:** The vendor has declined to comment.
- **Sustainability:** The revenue earned from the Fund and Donor Management solution currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 8
- **Percent of Survey Respondents Who Would Recommend the System:** 63 percent
- **Training Score:** .78
- **Implementation Score:** .27
- **Support Score:** .97

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# BLACKBAUD FINANCIAL EDGE NXT AND THE RAISER'S EDGE NXT (W/ GIFTS ONLINE)

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The second solution for community foundations from Blackbaud implements Financial Edge NXT and The Raiser's Edge NXT together for a strong, integrated back-office solution for financial management, donor management, and relationship and communications management. Grants and application management can be provided by Blackbaud's GIFTS Online, Fusion Labs' GE Spectrum, or a third-party system—for this report, we've reviewed this solution integrated with GIFTS Online. Each system provides two user interfaces: the updated web view interface, where most users will view fund or donor records, record notes on calls or meetings, and enter new donations; and the classic dashboard view (familiar to those users with experience in earlier editions of the systems), where users can create new funds, accounts, or advanced reports. Reporting is strong in both Financial Edge and The Raiser's Edge, with a useful collection of pre-packaged reports for both fundraising and financial management. The Insights and Dashboard modules, currently in beta, provide a more user-friendly reporting experience in the web view. However, the integration between the systems is not seamless, and currently fundraising reports can only be run in The Raiser's Edge and financial reports in Financial Edge. Additionally, there's currently no automatic exchange of grant and application data from GIFTS Online to the systems—you'll need to manually import and export data between that system and the back-end, or pay for third-party integration—but the vendor reports that this is on the product roadmap. As a result, some information—such as fund restrictions, spending policy, or reporting schedules—must be tracked in Financial Edge as custom fields or notes. Overall, while Blackbaud's other offering, FIMS, is best suited for community foundations that need strong functionality for managing endowments or that need to be able to unitize investments, this solution may be a stronger option for foundations with substantial development or prospecting needs and those where grant officers, development staff, and the accounting team work more independently. Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.
- **Annual Recurring cost (bare minimum):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.
- **Licensing plus all available functionality included:** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.
- **Annual Recurring cost (all functionality):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.
- **Annual Recurring cost (bare minimum):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.

- **Licensing plus all available functionality included:** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.
- **Annual Recurring cost (all functionality):** Pricing for the system is determined by the number of constituent records stored—contact the vendor for a custom quote.

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are provided by a separate product, GIFTS Online, at additional cost.
- **Support for Both Individual Applicants and Organizations:** The system allows both individuals and organizations to apply for grants from the same grant program. The vendor has added substantial support for scholarships beyond the scope of this review.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** The system allows for eligibility quizzes that can branch to multiple applications.
- **Application Branching:** Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages:** The system supports a three-stage application with an eligibility quiz, LOI, and proposal. Grantmakers can also create as many status report stages as they'd like.
- **Online Application Integration:** Data from online applications can be accessed from the core grants management system—no download or upload of data files is required. The data is brought automatically into a staging area in the core system, where it can be reviewed by an administrator and either promoted into the database or declined.
- **Multiple Logins for Grantees:** Supports only one grantee login per grant application, but the original applicant can share the application with anyone they choose via email to view the application, transfer ownership of the application, and make edits to the application or reporting requirements.
- **Transfer of Account and History:** The grantee or applicant and the GIFTS Online administrator can transfer their account and history to new staff contact.
- **Reuse of Application Data:** Carries over contact information and other appropriate data for an organization or grant from one year's application form to another or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.
- **Application Autofill from Tax Record:** Grantseekers can automatically fill in their organization profile by entering their EIN number, through GuideStar's Project Simplify.
- **Viewing Proposal Status Online:** Applicants can view their status online.
- **Custom Confirmation Messages:** When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the web interface.
- **Application Formatting:** Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages. The system also accommodates video and formatting in HTML and XML.
- **Spell Checking for Online Applications:** Grantees can easily spell check applications.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving:** The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials:** Applicants and the grantmaker can quickly and easily retrieve lost passwords, but lost user IDs can only be retrieved by the grantmaker.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process.

- **Preview Packet:** The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access:** Application forms are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts:** The system checks the name, address, and EIN of each new registrant to make sure it doesn't already exist in the system. Possible duplicates are flagged for the grantmaker to choose whether to create a new account, merge with an existing account, or reject it.
- **Unified Accounts Across Grantmakers:** Grantees have separate accounts for each grantmaker using the system. If the grantmaker uses the optional Outcomes module for GIFTS Online, grantees have the option to use a single account for multiple funders.
- **Collaboration Between Grantseeker and Funding Organization:** The system allows the grantee to work on a proposal, save it as a draft, get comments or suggestions from the reviewer, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents:** The system performs a virus scan to prevent malicious files from being uploaded. The vendor also enlists a third party to perform periodic vulnerability tests.

## Form Design and Flexibility

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

## Application Review

- **Overall Approach to Application Review:** Application Review is provided by a separate product, GIFTS Online, at additional cost.
- **Viewing Relationship History:** Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, had declined, or been granted in the past.
- **Requirements Checklist:** Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications:** Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries:** Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal:** Provides a simplified "portal" interface to allow reviewers to see and review grant applications more easily.
- **Viewing Files:** Reviewers can easily view selected documents associated with the request and stored in the system as a single, merged .PDF.
- **Grant Review Workflows:** Lets you define automatic steps and rules, or "workflow," for the grants review process.
- **Multiple Reviewer Support:** Multiple reviewers can each rate an application on a number of different factors and add comments.
- **Scoring Flexibility:** Supports different information or scoring schemes for different programs, which are customizable by foundation staffers.
- **Online Application Review:** Supports online viewing and reviewing of applications.
- **External Reviewer Profiles:** Lets you track external reviewers' interests and potential conflicts of interest and use that criteria to assign applications for review along with tracking reviewers and applications by geography or other criteria defined by grantmaker for making assignments.

- **Comment Sharing Among Reviewers:** Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores:** Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification:** The proposal owner and grants management staff can be automatically notified via email when reviews are completed. External reviewers can be notified when an application is accepted.

## 501(c)(3) and OFAC Status

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

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are provided by a separate product, GIFTS Online, at additional cost.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported within the core system itself.
- **Creating New Funds:** Lets the grant manager easily create a new fund in the database view by setting the fund ID and associating the correct accounts. Alternatively, a grant manager could create a new restricted fund using the Projects and Grants objects, and selecting the appropriate restrictions from a drop-down menu.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) which are then enforced by the system.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system does not automatically calculate a suggested annual payout for a fund. Spending rules are defined as notes within the system.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the cash value of fund investment in each pool.

- **Investment Quick Entry:** Allows a foundation staff person to run an allocation report which calculates the amount of investment income to allocate per fund, and automatically distribute those allocations.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number.
- **Accounting Integration:** Includes a robust, integrated accounting package.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support:** Only supports grants in a single currency. It is possible to configure additional Financial Edge databases for one organization to support grants made in other currencies.
- **Multi-Currency Reporting:** Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting:** Lets you reports on payments which carries coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** If using GIFTS Online to manage grant applications, grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues:** The system supports the ability to void payments, make refunds, place payments on hold, update payment details in batch, and create payments in batch. The system supports quid pro quo and in kind payments, depending on how you set up the accounts for those payments.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting:** Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending). You cannot easily track additional categories as well, though—for example, to track budgets for both programs and geographic areas.

- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant:** Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting:** Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discrete.
- **Drafting Budgets for "What-If" Scenarios:** Lets you set up "what-if" scenarios in the database view of the system. The vendor reports that this functionality will be available in the web view interface in November 2017.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported within the core system itself.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts "In Honor Of" and Tributes:** Lets you track gifts given "in honor of," and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts, through the Securities module, at additional cost.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

## Donor Portal

- **Overall Approach to Donor Portal:** Donor Portal functionality is supported by a separate product, Donor Central, at additional cost.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal. This requires the integrated Online Express module, at additional cost. The vendor reports that this functionality will be available through Donor Central as of November 2017.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of "approved nonprofits."
- **Grant Recommendations:** Lets donors search for giving opportunities and suggest grants, but can't filter or match by a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Tracking Individual History:** Lets you keep a record of an individual’s association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized Communication:** Can set send criteria to communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact).
- **Record of Correspondence:** Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging:** Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture:** A plug-in is available to automatically capture emails and attachments from Outlook into the GIFTS Online grantmaking system.
- **Contact Synchronization:** Plug-ins are available to automatically synchronize contacts with Outlook.

## Letters and Board Dockets

- **Overall Approach to Print Communication:** Letters and Board Dockets are supported within the core system itself.
- **Default Print Format:** Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors and logos, if using GIFTS Online to manage grant applications.
- **Mail-Merge Fields in Letter Templates:** Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors and logos.
- **Printing Series of Summaries:** Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization:** Lets you view and customize individual letters before printing them.
- **Board Docket Attachments:** Lets you attach documents to board docket, if using GIFTS Online to manage grant applications.

- **Electronic Signatures:** The system supports electronic signatures with an external approval process, if using GIFTS Online to manage grant applications.
- **Electronic Templates:** Includes templates for print and electronic formats.

## Emails

- **Overall Approach to Email Communication:** Email is supported through Blackbaud's Online Express module, included as part of the Raiser's Edge NXT.
- **Emailing Individuals and Groups:** Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility:** Lets you create email to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data.
- **Email Attachments:** Lets you attach files to emails sent to individuals, but not groups.
- **Email Delivery Reporting:** Lets you see the open rate, click-through rate and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email:** Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method:** Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking:** The system relies on the browser's built-in spell-check functionality.

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training. Donor management and fundraising reports are handled within The Raiser's Edge, while financial and grant reports are handled within The Financial Edge.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification:** Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Fund Statements:** There are no pre-packaged templates for fund statements. Fund statements are generated by running a report on a donor's fund(s) and merging the results into a letter template created in Microsoft Word or an equivalent word processor.
- **Donor Management Reports:** The system provides pre-packaged standard reports for common fundraising and donor management needs, within The Raiser's Edge.
- **Favorite Reports, Queries, and Actions:** Lets you quickly view favorite reports without navigating a much-larger set
- **Saving Modified Reports:** Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting:** Supports ad hoc reports within the system, which can include and filter by nearly any field displayed to users. These reports can include custom data columns, data sets, sorting, grouping, logos and headers.
- **Grant Summary Tracking:** Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability:** Virtually all system data—including data entered into online applications, review forms and grantee progress reports—can be included in reports.
- **Report Drill-Down:** Lets you drill down for more information on some or all reports.
- **Attachment Searching:** Does not let you search within attached documents.
- **Automating Reports:** Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports:** Lets you create, view, and export data in a visual graphic representation such as charts and graphs.

- **User Dashboards:** Provides “dashboard” views which summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates:** GIFTS Online provides report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, Reporting Commitment hGrant format, or the Columbus Survey.

## Permissions & Workflow

- **Permissions Granularity:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions:** You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging:** Records data updates, along with the data change and the user who made the update, in an audit log which is available as a report and can be exported.
- **User Dashboards:** Provides “dashboard” views which summarize the grants currently relevant to each individual user.
- **Users Task Lists:** Does not provide users a task list upon sign on.
- **Task Assignment:** Does not let you assign tasks to other users.
- **Board/Management View:** Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment:** Does not assign tasks to users based on rules and roles.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .xls or .csv.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Custom Data Feeds:** The vendor provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Third-Party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with DonorCentral.
- **Mobile Device Application Review:** GIFTS Online provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device:** GIFTS Online provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity:** The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for most fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom “internal tracking” fields for staff use.
- **Custom Fields:** The system includes unlimited custom fields and you can rename system-standard fields. Custom fields have the same functionality as system standard fields. The creation and change date/user of any element in the database is recorded.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms,
- **Vendor Customization:** Vendor will not customize the system to your needs.

- **System Extendibility:** Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems:** Vendor excludes extensively customized systems from the upgrade path.
- **Support for Multiple Languages:** Lets you define custom language sets for admin users and reviewers based on user, group, or giving program. Language settings are limited to latin characters only--Unicode or right-to-left character sets are not supported. Online application forms can be defined in multiple languages.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides unlimited phone support without additional cost.
- **Online Support:** Vendor provides unlimited online or chat support without additional cost.
- **Manuals and Documentation:** Vendor provides an online knowledgebase with user manuals, articles, and on-demand videos with step-by-step instructions.
- **Training:** The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled. In-person training sessions can be scheduled at additional cost.
- **User Support Forums:** There are user support forums or discussion groups available in the online knowledgebase provided by the vendor.

## Installation and Maintenance

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

## Stability in the Market

- **History:** The vendor has been in business since 1981; The system has been in use by clients since 1992.
- **Client Base:** The vendor has declined to comment.
- **Sustainability:** The revenue earned from the Fund and Donor Management solution currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

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

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# BROMELKAMP COMMUNITY AKOYA.NET

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Built on Microsoft's Dynamics CRM platform, Community Akoya.net is Bromelkamp's newest offering for community foundations. The system leverages Dynamics' flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, Community Pearl, Community Akoya.net relies on Bromelkamp's eGrant.net module to support online applications for competitive grants and scholarships, as well as application review, at additional cost. Integration with the included Intacct Accounting provides solid support for grant payments and program budgets within the system, but staff members will need to manually record investment income for funds. The FundWeb.net module lets donors easily manage their funds online—while donors cannot directly make online deposits to their funds, the portal can link to the foundation's donation page. Reporting functionality is solid, with a good selection of pre-packaged reports for donor management and fundraising, and the Dynamics platform offers a good range of customization that can be performed by a foundation. Pricing for the system is determined by number of users—a smaller foundation with five named users and the optional eGrant.net module could expect to pay around \$53,000 in the first year, with recurring annual costs of \$23,000.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$38,000
- **Annual Recurring cost (bare minimum):** \$23,000
- **Licensing plus all available functionality included:** \$60,000
- **Annual Recurring cost (all functionality):** \$25,500

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$78,000
- **Annual Recurring cost (bare minimum):** \$58,500
- **Licensing plus all available functionality included:** \$95,000
- **Annual Recurring cost (all functionality):** \$61,000

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported by an additional eGrant.net module, at no additional cost.
- **Support for Both Individual Applicants and Organizations:** The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor, but requires eGrant.net Builder module at additional cost.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** It's possible for eligibility quizzes to branch to multiple applications.

- **Application Branching:** Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages:** Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed—with the eGrant.net module.
- **Online Application Integration:** Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees:** Does not support multiple logins for grantees.
- **Transfer of Account and History:** Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data:** Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Application Autofill from Tax Record:** Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that they can integrate with Project Simplify by request, at additional cost.
- **Viewing Proposal Status Online:** Applicants can view their status online, with the eGrant.net module.
- **Custom Confirmation Messages:** Lets you customize a confirmation message to be sent upon submission of an application, with the eGrant.net module.
- **Application Formatting:** Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, with eGrant.net Builder module, at additional charge.
- **Spell Checking for Online Applications:** The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later, with the eGrant.net module.
- **Application Auto-Saving:** The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections, and the system warns you at regular intervals if you do not save manually.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials:** Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet:** The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access:** Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts:** The system will check the applicant ID of a new registrant to make sure it isn't already in the system. The system will prompt users with a list of possible duplicates to manually de-dupe.
- **Unified Accounts Across Grantmakers:** Applicants can use the same credentials in the eGrant.net module across all foundations on the system, but cannot manage grant information for all funders through the same account.
- **Collaboration Between Grantseeker and Funding Organization:** The system allows reviewers to unsubmit a proposal and request additional information from the applicant via email, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents:** All documents and images are scanned for viruses before uploading to the system.

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation, with the eGrant.net module.
- **Character and Word Counts:** The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum character limits for each field.

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

## Application Review

- **Overall Approach to Application Review:** Application review is supported by an additional eGrant.net module, at no additional cost.
- **Viewing Relationship History:** Lets you see a history of a relationship with prospective grantees—for example, what grants they’ve applied for, had declined, or were granted in the past.
- **Requirements Checklist:** Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications:** Lets you reopen online applications once they’ve been submitted if more information is required from the applicant.
- **Printing Grant Summaries:** Both internal and external reviewers can easily print grant summaries or full grant information. Reviewers can easily print grant summaries or full grant information, with the eGrant.net Reviewer module.
- **Reviewer’s Portal:** Provides a simplified “portal” interface to allow reviewers to see and review grant applications more easily, through the eGrant.net Reviewer module, at no additional cost.
- **Viewing Files:** Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows:** Lets you define automatic steps and rules, or “workflow,” for the grants review process.
- **Multiple Reviewer Support:** Multiple reviewers can each rate an application on a number of different factors, and add comments, with the eGrant.net Reviewer module.
- **Scoring Flexibility:** Supports different information or customizable scoring schemes for different programs.
- **Online Application Review:** Supports online viewing and reviewing of applications with the eGrant.net Reviewer module.
- **External Reviewer Profiles:** Lets you track external reviewers’ interests and potential conflicts of interest and use those criteria to assign applications for review, with the eGrant.net Reviewer module.
- **Comment Sharing Among Reviewers:** Lets you choose whether to allow reviewers to see each other’s comments and grades.
- **Numeric Review Scores:** Lets you view numeric review scores and report them as summary statistics—for example, average score—with the eGrant.net Reviewer module. Additional calculations are possible by exporting to Microsoft Excel.
- **Review Status Notification:** Proposal owner and grants management staff can be automatically notified when reviews are completed, with the eGrant.net Reviewer module.

## 501(c)(3) and OFAC Status

- **501(c)(3) Status Checking:** Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry and flags those not listed. The system checks against IRS Publication 78 via GuideStar Charity Check, as well as against the CRA registry for Canadian organizations.
- **OFAC Status Checking:** Lets you compare organizations against standard OFAC and other terrorist watch lists within the grants management system itself, but individuals cannot be checked. The system checks against LexisNexis Bridger Insight.
- **Manual Organization Lookup Through GuideStar:** Does not let you access GuideStar data for organizations, through Project Simplify, within the system itself.
- **Documentation for Organization Lookup and Data Initiatives:** Does not let you access GuideStar data for organizations, through Project Simplify, within the system itself.

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are supported by an additional eGrant.net module, at no additional cost.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.

- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported through an integration between the core system and Intacct accounting. This integration is provided at no additional cost.
- **Creating New Funds:** Lets the grant manager easily create a new fund by selecting the type of fund and restrictions, and assigning a contact and accounting code to the fund.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions which can be enforced through in-system business rules and notifications.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money by clicking through on the fund record in either the core system or the accounting system.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the cash value of fund investment in each pool, through the integrated accounting software.
- **Investment Quick Entry:** Users can record investment incomes to all funds simultaneously by running an allocation report, which automatically calculates and adjusts the funds.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration:** Includes a robust, integrated accounting package. The vendor has experience in integrating the system with external accounting software packages.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.

- **Multi-Currency Support:** Supports grants made in multiple currencies by storing currency and exchange rate information, but only supports a static currency rate conversion. Vendor could configure more robust multiple currencies at additional cost.
- **Multi-Currency Reporting:** Lets you report on grants and payments made in any currency.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** The system provides the ability to include notes on payments.
- **Payment Reporting:** Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this could be done using custom fields on in-system status messages to grantees.
- **Other Payment Issues:** The system has the ability to void, refund, or hold payments. The system creates payments in batch using the scheduling tool. Payment details can be updated in batch through the bulk edit tool or update queries. The system can track the monetary value of in-kind and quid pro quo payments.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported through an integration between the core system and Intacct accounting. This integration is provided at no additional cost.
- **Budget Tracking Configuration:** You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting:** Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas, but requires customization at additional cost.
- **Budget Basing:** Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant:** Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting:** Lets you easily set up multi-year budgeting.
- **Drafting Budgets for “What-If” Scenarios:** Does not let you set up “what-if” scenarios.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and tracking donations is supported through an integration between the core system and Intacct accounting. This integration is provided at no additional cost.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **Reminders for Pledges:** Can flexibly configure the system to notify the appropriate staff member(s) with a reminder or via email when a pledge is near due.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a matching record on each new gift entry. This tracks the matching amount and whether the match has been paid.

- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit for bringing in a gift to staff members by assigning the Owner of the gift. By default, the owner of a gift is the person entering the gift in the system.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Stock Gifts:** The system can track the Sold value of stock gifts, but not the Unsold value.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts as custom gift types.

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported by an additional FundWeb.net module.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal by linking to the foundation’s online giving form(s).
- **Viewing Grant Opportunities:** Does not provide a charitable catalogue or directory of “approved nonprofits.”
- **Grant Recommendations:** Lets donors search for giving opportunities and suggest grants, but can’t filter or match by a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact?:** Lets you mark that a particular person should not be contacted, which automatically blocks the donor’s address from being targeted for marketing communications.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Tracking Individual History:** It’s possible to capture multiple individuals on online forms. Lets you keep a record of an individual’s association with a grantee, even if they leave, for historical and audit purposes, but they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.

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

## Letters and Board Dockets

- **Overall Approach to Print Communication:** Letters and Board Dockets are supported within the core system itself.
- **Default Print Format:** Lets you define a default format for printing grant application summaries and choosing which fields to include, as well as customizing fonts, colors, and logos.
- **Mail-Merge Fields in Letter Templates:** Lets you create letter templates in Microsoft Word, or an equivalent web-based word processor, that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.
- **Printing Series of Summaries:** Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization:** Lets you view and customize individual letters before printing them.
- **Board Docket Attachments:** Lets you attach documents to board docket.
- **Electronic Signatures:** The system typically uses individual user IDs for authorization. An integration with Adobe Sign is available from Adobe, at additional cost.
- **Electronic Templates:** The system includes templates for print and email formats.

## Emails

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

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
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- **Fund Statements:** Lets you easily generate fund statements using pre-packaged templates.
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- **Report Drill-Down:** Lets you drill down for more information on some or all reports.
- **Attachment Searching:** Lets you search the contents of file attachments.
- **Automating Reports:** Lets you set reports to automatically run and send to individuals or groups.
- **Visual Reports:** Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards:** Provides “dashboard” views that summarize the grants currently relevant to each individual user. Lets you create your own multiple unique dashboards.
- **Industry-Standard Reporting Templates:** The system contains the Foundation Center eReporting Excel format, but not IATI Reporting Commitment or hGrant format. Users can add these themselves or ask the vendor to do so at additional cost.

## Roles and Permissions

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

## Data Access

- **Data Export:** Lets you export all data visible to users into Excel format, but through an unautomated entity-by-entity process. Financial and accounting data can be scheduled to download automatically.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Custom Data Feeds:** Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system. Clients can interact programmatically with Community Akoya.net through the Dynamics API.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with: GuideStar CharityCheck, Authorize.net, Microsoft Office, MailChimp, online survey tools, and geocoding services.
- **Mobile Device Application Review:** Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device:** Provides a responsive interface specifically designed to let you see grant summaries and details from a mobile or tablet device. An iOS and Android app for Microsoft Dynamics itself is also available.
- **Data Integrity:** The vendor reports that the system protects data through SSL security with multiple firewall protections, nightly on-site backups, weekly off-site backups, and 128bit encryption.

## Overall Customization

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

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides phone support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Online Support:** Vendor provides email support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Manuals and Documentation:** The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.
- **Training:** The vendor provides initial training in person at no additional cost. Additional training sessions can be scheduled at additional cost.
- **User Support Forums:** The vendor reports that a user forum will be available from the product website as of Summer 2017.

## Installation and Maintenance

- **Installation and Maintenance:** This online hosted system is accessible from any major web browser. The system requires Windows 7 or later or Mac OS 10.8 or later as an operating system. The integration with Microsoft Office requires Office 2010 or later.

## Stability in the Market

- **History:** The vendor has been in business since 1978; Community Akoya.net has been in use since 2015.
- **Client Base:** The vendor reports that Community Akoya.net has seven clients. Breakdown by foundation type is 70 percent community foundations, 30 percent public foundations.
- **Sustainability:** The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 4
- **Percent of Survey Respondents Who Would Recommend the System:** 100 percent
- **Training Score:** .75
- **Implementation Score:** .42
- **Support Score:** .89

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# BROMELKAMP COMMUNITY PEARL

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Community Pearl is a traditional, installed software package built in Microsoft Access, which is both a strength and a weakness. On one hand, Access includes a solid report builder, is strong in data tracking, and provides a flexible database platform—which Bromelkamp uses to tailor Community Pearl to each client’s needs, including adding fields or features to support unique processes. Someone with Access development experience can extend the system’s functionality with minimal or no vendor assistance. On the other hand, Access has limitations in user interface design options, which shows itself in Community Pearl through screens that, while feature-rich, can feel crowded and hard to navigate. Like Community Akoya.net, Community Pearl relies on Bromelkamp’s eGrant.net module to support online applications for competitive grants and scholarships as well as application review, at additional cost. Community foundations that actively fundraise from individual donors may find the fundraising functionality lacking. Pledge installments must be scheduled manually, and staff must run a report to see pledges that are due soon, but donors can make deposits to their fund(s) directly from the donor portal. Pricing for the system is determined by number of users—a smaller foundation with five named users and the optional eGrant.net module could expect to pay around \$80,000 in the first year, with recurring annual costs of \$9,000.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$66,000
- **Annual Recurring cost (bare minimum):** \$9,000
- **Licensing plus all available functionality included:** \$88,000
- **Annual Recurring cost (all functionality):** \$11,500

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$86,750
- **Annual Recurring cost (bare minimum):** \$10,000
- **Licensing plus all available functionality included:** \$110,000
- **Annual Recurring cost (all functionality):** \$12,500

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported by an additional eGrant.net module, at no additional cost.
- **Support for Both Individual Applicants and Organizations:** The system allows both individuals and organizations to apply for grants from the same grant program.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from vendor, but requires eGrant.net Builder module at additional cost.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** It’s possible for eligibility quizzes to branch to multiple applications.

- **Application Branching:** Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations and 501(c)(3) organizations.
- **Support for Multiple Stages:** Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed—with the eGrant.net module.
- **Online Application Integration:** You must manually download application data from the eGrant module and import in order to view online application data within the core grants management system.
- **Multiple Logins for Grantees:** Does not support multiple logins for grantees.
- **Transfer of Account and History:** Lets a grantee or applicant transfer his or her account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data:** Carries over contact information and other appropriate data for an organization or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter Of Intent doesn't have to be re-entered in a proposal, with the eGrant.net module.
- **Application Autofill from Tax Record:** Grant seekers cannot automatically fill in their organization profile by entering their EIN number. The vendor reports that they can integrate with Project Simplify by request, at additional cost.
- **Viewing Proposal Status Online:** Applicants can view their status online, with the eGrant.net module.
- **Custom Confirmation Messages:** Lets you customize a confirmation message to be sent upon submission of an application, with the eGrant.net module.
- **Application Formatting:** Grantmakers can extensively format applications—for example, use rich text, create groups of questions, and create multiple pages, with eGrant.net Builder module, at additional charge.
- **Spell Checking for Online Applications:** The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later, with the eGrant.net module.
- **Application Auto-Saving:** The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections, and the system warns you at regular intervals if you do not save manually.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials:** Both applicant and grantmaker can quickly and easily reset lost credentials, with the eGrant.net module.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process, with the eGrant.net module.
- **Preview Packet:** The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access:** Does not explicitly support the application process via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Duplicate Accounts:** The system will check the applicant ID of a new registrant to make sure it isn't already in the system. The system will prompt users with a list of possible duplicates to manually de-dupe.
- **Unified Accounts Across Grantmakers:** Applicants can use the same credentials in the eGrant.net module across all foundations on the system, but cannot manage grant information for all funders through the same account.
- **Collaboration Between Grantseeker and Funding Organization:** The system allows reviewers to unsubmit a proposal and request additional information from the applicant via email, and work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents:** All documents and images are scanned for viruses before uploading to the system.

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation, with the eGrant.net module.
- **Character and Word Counts:** The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum character limits for each field.

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

## Application Review

- **Overall Approach to Application Review:** Application review is supported by an additional eGrant.net module, at no additional cost.
- **Viewing Relationship History:** Lets you see a history of a relationship with prospective grantees—for example, what grants they’ve applied for, had declined, or were granted in the past.
- **Requirements Checklist:** Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications:** Lets you reopen online applications once they’ve been submitted if more information is required from the applicant.
- **Printing Grant Summaries:** Both internal and external reviewers can easily print grant summaries or full grant information. Reviewers can easily print grant summaries or full grant information, with the eGrant.net Reviewer module.
- **Reviewer’s Portal:** Provides a simplified “portal” interface to allow reviewers to see and review grant applications more easily, but requires the eGrant.net Reviewer module, at additional cost.
- **Viewing Files:** Reviewers can easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows:** Lets you define automatic steps and rules, or “workflow,” for the grants review process, with the eGrant.net Reviewer module.
- **Multiple Reviewer Support:** Multiple reviewers can each rate an application on a number of different factors, and add comments, with the eGrant.net Reviewer module.
- **Scoring Flexibility:** Supports different information or customizable scoring schemes for different programs.
- **Online Application Review:** Supports online viewing and reviewing of applications with the eGrant.net Reviewer module.
- **External Reviewer Profiles:** Lets you track external reviewers’ interests and potential conflicts of interest and use those criteria to assign applications for review, with the eGrant.net Reviewer module.
- **Comment Sharing Among Reviewers:** Lets you choose whether to allow reviewers to see each other’s comments and grades.
- **Numeric Review Scores:** Lets you view numeric review scores and report them as summary statistics—for example, average score—with the eGrant.net Reviewer module. Additional calculations are possible by exporting to Microsoft Excel.
- **Review Status Notification:** Proposal owner and grants management staff can be automatically notified when reviews are completed, with the eGrant.net Reviewer module.

## 501(c)(3) and OFAC Status

- **501(c)(3) Status Checking:** Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry and flags those not listed. This system checks against GuideStar. Organizations are checked automatically by Pearl on a regular basis and Pearl keeps a copy of the verification .PDF in the document manager. The system supports tax verification for all 501(c) types.
- **OFAC Status Checking:** Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists via an export to ChoicePoint’s Bridger Insight.
- **Manual Organization Lookup Through GuideStar:** Lets you access GuideStar data for organizations within the system itself at an additional cost.
- **Documentation for Organization Lookup and Data Initiatives:** Does not let you access GuideStar data for organizations within the system itself.

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are supported by an additional eGrant.net module, at no additional cost.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported within the core system itself.
- **Creating New Funds:** Lets the grant manager easily create a new fund by setting the restrictions and assigning accounts for spendable and non-spendable assets.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) but does not enforce any actual restrictions on the use the funds.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the cash value of fund investment in each pool.
- **Investment Quick Entry:** Allows a foundation staff person to run an allocation report which calculates the amount of investment income to allocate per fund, and automatically distribute those allocations.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions. Optionally integrates directly with bank or third-party payment processors to initiate the payments.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.

- **Accounting Integration:** Includes a robust, integrated accounting package. The vendor has experience in integrating the system with external accounting software packages.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support:** The core system only supports grants in a single currency, but the vendor can customize the system to support grants made in multiple currencies by storing currency and exchange rate information, at additional cost.
- **Multi-Currency Reporting:** Lets you report on grants and payments made in any currency, but requires multi-currency customization at additional cost.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** The system provides the ability to include notes on payments.
- **Payment Reporting:** The system can be configured to send the coding attributes of associated requests/organizations/contacts to an accounting system.
- **Grantee Portal:** Grantees cannot view the payment schedule for their award(s) online through the grantee portal. The vendor reports that this could be done using custom fields on in-system status messages to grantees.
- **Other Payment Issues:** The system has the ability to void, refund, or hold payments. The system creates payments in batch using the scheduling tool, but payment details can only be updated in batch through Microsoft Access's Find and Replace tool. The system can track the monetary value of in-kind and quid pro quo payments.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting:** Lets you enter only a single budget amount for your whole organization.
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant:** Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting:** Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios:** Does not let you set up "what-if" scenarios.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported within the core system itself.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. Each pledge must be entered by hand, as opposed to generated based on a payment schedule.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified or you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Cannot easily track matching gifts that need to be claimed from employers. Matching gifts can be tracked as a soft credit, but you cannot track the match amount or distinguish matching gifts as a category.

- **Campaigns or Funds:** Lets you assign gifts to a particular source or campaign, but you cannot split the gift across multiples of these without entering it as multiple separate donations. Lets you split a gift across multiple funds.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to a staff member by adding a custom field.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Stock Gifts:** The system can track the Sold value of stock gifts, but not the Unsold value.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported by an additional FundWeb.net module.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal by linking to the foundation’s online giving form(s).
- **Viewing Grant Opportunities:** Does not provide a charitable catalogue or directory of “approved nonprofits.”
- **Grant Recommendations:** Lets donors search for giving opportunities and suggest grants, but can’t filter or match by a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track four phone numbers, one email address, and two physical addresses. You can label each of them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact?:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), or two-way (“spouse”), or directional (“boss; works for”). The system automatically creates the relationship for the linked donor if the relationship is a simple two-way one (spouse), but not for a directional relationship (“boss; works for”) - to do that, you must manually define the relationship for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Tracking Individual History:** It’s possible to capture multiple individuals on online forms. Lets you keep a record of an individual’s association with a grantee, even if they leave, for historical and audit purposes, but they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization and see grants for both the individual units and the larger organization.

- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized communication:** Can send email to any contact recorded in an application form.
- **Record of Correspondence:** Automatically stores a record of all system-generated letters and emails for each grant.
- **Call and Email Logging:** Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.
- **Email Capture:** Does not let you capture emails from an external email system.
- **Contact Synchronization:** System allows you to automatically export system contacts to a Microsoft Exchange public folder, but requires a module at additional cost.

## Letters and Board Dockets

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

## Emails

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

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.

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

## Roles and Permissions

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

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

- **Custom Data Feeds:** Provides a direct ODBC database connection to allow a programmer to create custom data feeds to or from an external system.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with Intuit QuickBooks and PeachTree accounting.
- **Mobile Device Application Review:** Does not explicitly support application review via mobile or tablet devices.
- **Grant Information Review from a Mobile Device:** Does not let you see grant summary and grant details from a mobile or tablet device.
- **Data Integrity:** The vendor reports that client data stored within the system and hosted on their servers (at an additional monthly fee) is protected with SSL security protocols, multiple firewall protections, and multi-site redundant backups.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom “internal tracking” fields for staff use.
- **Custom Fields:** The system lets you create an unlimited number of custom fields with the same permissions as system-standard fields.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms using the eGrant.net Builder module, at additional cost.
- **Vendor Customization:** Vendor will extensively customize system to your needs, at additional cost.
- **System Extendability:** Vendor permits clients to extend system functionality via access to underlying database and code, so long as existing modules and macros are not changed. While the vendor allows source code access, they retain the license to the code and the system is not “open source.”
- **Support for Customized Systems:** Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages:** Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides phone support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Online Support:** Vendor provides email support for a fee by the hour, or unlimited support as part of a monthly support and maintenance package.
- **Manuals and Documentation:** The vendor offers in-system help text, training videos, newsletter, and periodic webinars to users.

- **Training:** The vendor provides initial training in person at the client site at no additional cost. More training in person or over the web can be scheduled at additional cost.
- **User Support Forums:** The vendor reports that a user forum will be available from the product website as of Summer 2017.

## Installation and Maintenance

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

## Stability in the Market

- **History:** The vendor has been in business since 1978; Community Pearl has been in use since 1998.
- **Client Base:** The vendor reports that Community Pearl has 66 clients. Breakdown by foundation type is 95 percent community foundations, 5 percent public foundations.
- **Sustainability:** The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 39
- **Percent of Survey Respondents Who Would Recommend the System:** 82 percent
- **Training Score:** 1.10
- **Implementation Score:** .67
- **Support Score:** 1.10

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# FOUNDANT COMMUNITYSUITE (WITH GRANT LIFECYCLE MANAGER)

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Launched in 2016 following the acquisition of Smalldog Net Solutions, Foundant Technology's Community Suite makes use of Smalldog's fund accounting functionality, and when paired with Foundant's Grant Lifecycle Manager, offers a solid and affordable solution for community foundations. Easy-to-update online forms let you collect online grant applications, feedback from external reviews, and online progress reports from grantees, but the system doesn't support branching for applications or data collection. While the included donor portal doesn't let donors or fund advisors make online gifts or deposits to their fund(s), the "Grant Catalog" feature allows a foundation to publish grant proposals as crowdfunding projects, letting donors or the general public donate to fund potential grants. Options for printed materials are somewhat limited. Users don't have the ability to customize the format of printed grant applications, and if you want to email groups of donors or grantees, you'll need a third-party broadcast email client (at additional cost). While not as polished as other systems, Community Suite is easy for novice users to navigate and use, and will be of particular interest to smaller community foundations. Pricing for the system could start as low as \$15,000 in the first year for a smaller foundation, including Grant Lifecycle Manager to support online applications.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$12,000
- **Annual Recurring cost (bare minimum):** \$6,000
- **Licensing plus all available functionality included:** \$33,000
- **Annual Recurring cost (all functionality):** \$21,000

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$35,000
- **Annual Recurring cost (bare minimum):** \$18,000
- **Licensing plus all available functionality included:** \$96,000
- **Annual Recurring cost (all functionality):** \$61,000

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported by Foundant Grant Lifecycle manager.
- **Support for Both Individual Applicants and Organizations:** The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications:** Lets you create new online applications with file uploads, dropdown boxes, checkboxes, and text fields -- among others -- without additional charges from vendor.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** There's currently no eligibility quiz available in the system, but the vendor reports that an automated eligibility quiz will be available in September 2017.

- **Application Branching:** Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations versus 501(c)(3) organizations.
- **Support for Multiple Stages:** Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage, and multiple review stages.
- **Online Application Integration:** Data from online applications can be accessed from the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees:** A new organization view supports multiple grantee logins.
- **Transfer of Account and History:** It's not possible for a grantseeker to transfer their account and history to another person within that organization. The Foundation Administrator can make the transfer on the back end.
- **Reuse of Application Data:** Applicants can easily see submitted applications and make complete copies of previous applications in order to revise and resubmit them to the grantmaker.
- **Application Autofill from Tax Record:** Grant seekers can automatically fill in their organization profile and relevant fields in the application process by entering their EIN number, through Project Simplify's GuideStar for Grant Applications.
- **Viewing Proposal Status Online:** Applicants can view their status online.
- **Custom Confirmation Messages:** Lets you send an automatic confirmation to a grantee upon submission of each application stage, including a Letter Of Intent and the detailed proposal.
- **Application Formatting:** Allows grantmakers to format applications using groups of questions and rich text, but not multiple pages.
- **Spell Checking for Online Applications:** The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving:** Applications in progress are automatically saved at regular intervals.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials:** Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process.
- **Preview Packet:** The applicant can create a preview packet of their grant that includes either copies of all uploaded documents or links to them.
- **Mobile Device Application Access:** The system does not explicitly support the application process via mobile or tablet, although the application interface is fully functional on a mobile or tablet device.
- **Duplicate Accounts:** The system checks the email address and EIN of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers:** Applicants or grantees can manage all grant information for all of their funders in a separate product, GrantHub, at extra cost.
- **Collaboration Between Grantseeker and Funding Organization:** The system can let a grantee work on a proposal, save it as a draft, get comments or suggestions from a grantmaking staffer, and work back and forth until a proposal is complete on a field-by-field basis.
- **Security Scan for Uploaded Documents:** The system does not allow files with any executable-related file extension (.EXE, .BAT, etc.) file extension to be uploaded for security purposes. The system also offers security scan at the point of download.

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts, and navigation. Look and feel customization is typically performed by the vendor during initial setup.
- **Character and Word Counts:** The system includes character but not word counts for application questions, and displays prominently how many characters remain. An administrator can set and adjust character limit for any field.

- **In-System Help for Applicants:** The system includes in-system help configured by the vendor to be personalized to the foundation's particular needs.

## Application Review

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

## 501(c)(3) and OFAC Status

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

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are supported by Foundant Scholarship Lifecycle Manager.
- **Online Scholarship Applications:** Scholarship application can be completed online via the scholarship application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported within the core system itself.
- **Creating New Funds:** Lets the grant manager easily create a new fund by selecting the type of fund and restrictions, and assigning a grant approver.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) but does not enforce any actual restrictions on the use the funds.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools.
- **Investment Quick Entry:** Allows a foundation staff person to run an allocation report which calculates the amount of investment income to allocate per fund, and automatically distribute those allocations.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Does not currently support ACH payments and wire transfers.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration:** Includes a robust, integrated accounting package.
- **Automated Payment Approval Process:** Supports an automated payment approval process, but without a configurable workflow.
- **Multi-Currency Support:** Only supports grants in a single currency.

- **Multi-Currency Reporting:** Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting:** Lets you report on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues:** Lets you void or refund payments within the system, but you cannot put payments on hold. Lets you track quid pro quo and in-kind payments through the donor or fund record. Lets you update payment details or create payments (e.g., general ledger account, fund, etc.) in batch.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting:** Lets you enter only a single budget amount for your whole organization. Budgets for each grant program can be tracked as funds under the primary organization budget.
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant:** Cannot track grants split across more than one program for budgeting purposes.
- **Multiyear Budgeting:** Lets you set up budgets for multiple years, but there are no linkages among these; each year's budget is discreet.
- **Drafting Budgets for "What-If" Scenarios:** Does not let you set up "what-if" scenarios.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported within the core system itself.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats. The system provides templates for importing data.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, the system notifies you that a pledge exists.
- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified. / or you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Cannot easily track matching gifts that need to be claimed from employers.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, but you cannot split the gift across multiples of these without entering it as multiple separate donations.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts "In Honor Of" and Tributes:** Lets you track gifts given "in honor of," and tributes. Can generate letters to honorees.

- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported within the core system itself.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal by linking to the foundation's online giving form(s). The vendor reports that the ability to make deposits directly from the donor portal is on the product roadmap for 2017.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of "approved nonprofits." Foundation staff can publish grant proposals as to a Grant Catalog, allowing donors, fund advisors, or the general public to contribute to funding the proposal.
- **Grant Recommendations:** Lets donors search for giving opportunities and suggest grants, but can't filter or match by a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track as many addresses as you like, but not effective dates for a seasonal address. Foundation staff must manually switch the primary address for a contact's record.
- **Do Not Contact?:** Lets you mark that a particular person should not be contacted, which automatically blocks the donor's address from being targeted for marketing communications.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, "family member," "co-worker") with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way ("would like to meet"), or two-way ("spouse"), or directional ("boss; works for"). The system automatically creates the relationship for the linked donor if the relationship is a simple two-way one (spouse), but not for a directional relationship ("boss; works for") - to do that, you must manually define the relationship for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.
- **Tracking Individual History:** Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.
- **Customized communication:** Can send email to any contact recorded in an application form.
- **Record of Correspondence:** Stores a record of all system-generated email for each grant, but not other communications.
- **Call and Email Logging:** Lets you keep a log of outside communications, such as phone calls and emails, with a particular contact at a grantee organization.

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

## Letters and Board Dockets

- **Overall Approach to Print Communication:** Letters and Board Dockets are supported within the core system itself.
- **Default Print Format:** Lets you print a view of each grant application, but it includes all fields in the application and you cannot customize it.
- **Mail-Merge Fields in Letter Templates:** Lets you create letter templates in Microsoft Word or an equivalent web-based word processor that include mail-merged information about grants and organizations, and lets you customize their fonts, colors and logos.
- **Printing Series of Summaries:** Lets you print letters or summaries for a series of grants or grant applications in a single step.
- **Pre-Print Viewing and Customization:** You can view letters before printing them, but you cannot customize them.
- **Board Docket Attachments:** Does not let you attach documents to the board docket.
- **Electronic Signatures:** The system does not provide support for electronic signatures for independent secure verification. This is supported by the vendor's Grant Lifecycle Manager, which supports the online application and review functionality.
- **Electronic Templates:** The system does not include templates for print and electronic formats.

## Emails

- **Overall Approach to Email Communication:** Email sent to individuals is supported within the core system itself. Email to multiple groups of recipients requires a third-party broadcast email client, at additional cost.
- **Emailing Individuals and Groups:** Lets you easily send an email to a particular individual, but not to a group of people at once.
- **Email Template Flexibility:** Lets you create email to individuals based on templates that include both standard text and "mail-merge" type inserted data, but group emails cannot include mail-merged fields.
- **Email Attachments:** Does not let you attach files to emails.
- **Email Delivery Reporting:** Does not let you see email delivery statistics.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email:** Does not let you set up scheduled email reminders to applicants and grantees. This is supported by the vendor's Grant Lifecycle Manager, which supports the online application and review functionality.
- **Outbound Email Method:** Emails are sent through the vendor's email service to protect you from blacklisting and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking:** The system relies on the browser's built-in spell-check functionality.

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification:** Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs, by creating a custom "view" over the report.
- **Fund Statements:** Lets you easily generate fund statements using pre-packaged templates.
- **Donor Management Reports:** The system provides pre-packaged standard reports for common fundraising and donor management needs.

- **Favorite Reports, Queries, and Actions:** Cannot quickly view favorite reports without navigating a much larger set, except by bookmarking the report in your browser.
- **Saving Modified Reports:** Does not let you name and save reports that you create or modify. Custom report “views” can be saved and reused.
- **Ad Hoc Reporting:** Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking:** Cannot track or report summaries based on any codes—for example, to show grant money paid for a set of geographical region—but can report on grant summaries by fund.
- **Data Reportability:** Virtually all system data—including data entered into online applications, review forms, and grantee progress reports—can be included in reports.
- **Report Drill-Down:** Lets you drill down for more information on some or all reports.
- **Attachment Searching:** Does not let you search within attached documents.
- **Automating Reports:** Reports cannot be set to automatically run and send to individuals or groups.
- **Visual Reports:** There is no ability in the system to create charts or graphs from report results. Additional formatting is possible by exporting the report to Microsoft Excel.
- **User Dashboards:** The system does not provide “dashboard” views to summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates:** The system does not, by default, contain report templates that align with sector-wide reporting standards. Templates for the Foundation Center’s eReporting Excel format are provided in the vendor’s Grant Lifecycle Manager, which supports the online application and review functionality.

## Roles and Permissions

- **Permissions Granularity:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions:** It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** Does not provide a simpler interface for users with less-complex needs, but menu and navigation options are determined by the modules and actions the user has permission to view or edit.
- **Audit Logging:** Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards:** All users see the same view of information; no “dashboard” views are available.
- **Users Task Lists:** Provides users a “task list” when they sign onto the system.
- **Task Assignment:** You can assign tasks, such as reviews, to other users.
- **Board/Management View:** Does not provide a focused, roles-based view for management and board members.
- **Role-Based Task Assignment:** Assigns tasks to users based on rules and roles.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Custom Data Feeds:** Does not allow a programmer to create custom data flows to an external system.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with: GuideStar Charity Check & Search or Ajah for Canadian charities, Foundation Center, Great Nonprofits, and Stripe.
- **Mobile Device Application Review:** Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.

- **Grant Information Review from a Mobile Device:** Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity:** System data is stored on Amazon’s AWS servers. The vendor reports that the integrity and security of data within the system is protected through multiple web servers, mirrored databases, daily backups, as well as backups to another Amazon AWS region on a daily basis. The system only runs on HTTPS connections, and database servers are protected by firewalls. All code updates to the system are developed and tested before being released to the production environment.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom “internal tracking” fields for staff use
- **Custom Fields:** Lets you create custom fields that have similar permissions to system-standard fields.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms at no additional cost, including visual design aspects.
- **Vendor Customization:** Vendor will not customize the system to a particular client’s needs, but does develop or upgrade features based on customer feedback.
- **System Extendability:** Vendor does not allow clients access to database and code to extend system functionality.
- **Support for Customized Systems:** As the vendor does not offer customized solutions, all instances remain on the upgrade path.
- **Support for Multiple Languages:** Does not let you define custom language sets based on user, group, or giving program. Online application forms can be defined in multiple languages.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides unlimited phone support without additional cost.
- **Online Support:** Vendor provides unlimited email and chat support without additional cost.
- **Manuals and Documentation:** Vendor provides an online knowledgebase with tutorials, eLearning, and user certification tests.
- **Training:** The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled, at additional cost. In-person training is also available, at additional cost. Self-directed training modules and user certification tests are available as part of the online knowledgebase, at no additional cost.
- **User Support Forums:** There are user support forums or discussion groups available.

## Installation and Maintenance

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

## Stability in the Market

- **History:** The vendor has been in business since 2006, and merged with Smalldog in 2016. The CommunitySuite product has been in use since 2012, and the Grants Lifecycle Manager system has been in use since 2007.
- **Client Base:** The vendor reports that they have 38 CommunitySuite clients, all community foundations, and 1,150 total clients using the Grant Lifecycle Manager product, including 140 community foundation clients.
- **Sustainability:** The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 21
- **Percent of Survey Respondents Who Would Recommend the System:** 100 percent
- **Training Score:** 1.43
- **Implementation Score:** 1.32
- **Support Score:** 1.65

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# FUSION LABS GE SPECTRUM

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The standalone Fusion Labs GE Spectrum includes several facets, including the GrantedGE grants management system and either the vendor's native Spectrum online web portal or the PROFFER online application management (which integrates with Blackbaud's NetCommunity). The system tightly integrates with other Blackbaud products, too, such as Raiser's Edge to provide fundraising functionality, and Financial Edge to support fund management, grant payments, and budgeting. The system can handle event- and schedule-triggered emails, and can provide an outbound server for broadcast email, shielding users from the risk of blacklisting. Fusion Lab's online form modules support reasonably sophisticated formatting of forms, including application branching, eligibility quizzes, and support for multiple logons for applicants from a single organization. Donors and fund advisors have the ability to donate or make deposits to their fund(s) online via the donor portal, and can view grant opportunities that match their personal interests or other criteria. Pricing for the system is determined on client-by-client basis, but the vendor reports that smaller foundations could expect to pay around \$16,000 in the first year for the installed system, or around \$7,500 per year for the hosted system.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$7,500 hosted, \$16,000 installed
- **Annual Recurring cost (bare minimum):** \$7,500 hosted, \$16,000 installed
- **Licensing plus all available functionality included:** \$7,500 hosted, \$16,000 installed
- **Annual Recurring cost (all functionality):** \$7,500 hosted, \$16,000 installed

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$30,000 hosted, \$64,000 installed
- **Annual Recurring cost (bare minimum):** \$30,000 hosted, \$64,000 installed
- **Licensing plus all available functionality included:** \$30,000 hosted, \$64,000 installed
- **Annual Recurring cost (all functionality):** \$30,000 hosted, \$64,000 installed

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported by the Spectrum Web Portal.
- **Support for Both Individual Applicants and Organizations:** The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes, and text fields without additional charges from the vendor, and that are fully configurable to the look and feel of the foundation's website.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** Eligibility quizzes can branch to multiple applications.

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

## Form Design and Flexibility

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

## Application Review

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

## 501(c)(3) and OFAC Status

- **501(c)(3) Status Checking:** Automatically checks Employee Identification Numbers against the GuideStar Charity Check database and flags those not listed. The system automatically fills in related fields for legal name, EIN, and tax status, but does not include data/time stamp, which can serve as an audit trail demonstrating completion of due diligence steps, and you cannot perform checks or updates in batch.
- **OFAC Status Checking:** Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself.
- **Manual Organization Lookup Through GuideStar:** Lets you manually access GuideStar data for organizations within the system itself, through Charity Check.

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

## Scholarships

- **Overall Approach to Scholarships:** Online Applications are supported by the Spectrum Web Portal.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported by integrating with Blackbaud's Financial Edge, at additional cost.
- **Creating New Funds:** Lets the grant manager easily create a new fund.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Fund restrictions are controlled by the financial system. Lets donors specify fund restrictions (as per a comment field) which are then enforced by the system, if using Blackbaud's Financial Edge NXT. If using an earlier release of Financial Edge, the system will display a warning, but not enforce any actual restrictions on the use of the funds.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** Allows a foundation staff person to easily update the value of a fund based on investment income by manually recording the realized and unrealized gains from an investment statement.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the proportion of fund investment in each pool, through integrating with back-office accounting software.
- **Investment Quick Entry:** Allows a foundation staff person to run an allocation report which calculates the amount of investment income to allocate per fund, and automatically distribute those allocations.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported by integrating with Blackbaud's Financial Edge, at additional cost.
- **Default Payment Scheduling:** Lets you define a default payment schedule that applies to all grants and then adjust the amounts and dates for each grant individually.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Allows users to design and develop a custom check, which can be printed from within the system, but requires a real-time interface with a financial system to ensure that there is a financial audit trail.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.

- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).
- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid, and check/ACH payment/wire transfer number.
- **Accounting Integration:** GE/Spectrum can be integrated with Blackbaud's Financial Edge, Blackbaud CRM, and QuickBooks in real time. The vendor has experience in integrating the system with other accounting systems.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support:** Only supports grants in a single currency.
- **Multi-Currency Reporting:** Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** Lets you include notes on payments.
- **Payment Reporting:** Lets you pull reports on payments that carry coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues:** Lets you void payments, make refunds, and place payments on hold. Has the ability to update payment details (e.g., general ledger account, fund, etc.) and ability to create payments in batch as an encumbrance batch. There's no current ability to track quid pro quo or in-kind payments, although you can track program-related expenses.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** Budgeting features are designed to track only the amount paid out in a particular time period and not the total amount awarded.
- **Budget Amount Reporting:** Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Does not let you base current years' budget on the previous year.
- **Multiple Programs Per Grant:** Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting:** Lets you easily set up multi-year budgeting.
- **Drafting Budgets for "What-If" Scenarios:** Does not let you set up "what-if" scenarios.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.

- **Viewing Pledges on Gift Entry:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Reminders for Pledges:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Matching Gifts:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Campaigns or Funds:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Tracking Credit for Gifts:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Organizational Gifts:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Gifts "In Honor Of" and Tributes:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Stock Gifts:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Other Gift Types:** Adding and Tracking Donations is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported by the Spectrum Web Portal.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of "approved nonprofits."
- **Grant Recommendations:** Lets donors select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported by integrating with Blackbaud's The Raiser's Edge, at additional cost.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people's seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact?:** Lets you display a field near the top of the donor screen to notify staff that a particular person should not be contacted.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, "family member," "co-worker") with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way ("would like to meet"), two-way ("spouse") or directional ("boss; works for..."), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationships.

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

## Letters and Board Dockets

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

## Emails

- **Overall Approach to Email Communication:** Emails are supported within the core system itself.
- **Emailing Individuals and Groups:** Lets you send email through the system to a single individual or group that meets particular criteria. Group emails are not sent as blind copies but as one-to-one.
- **Email Template Flexibility:** Lets you create emails for individuals and groups based on templates that include both standard text and “mail-merge” type inserted data, and edit individual emails from a batch sent out based on a template.
- **Email Attachments:** Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting:** Lets you see the open rate, click-through rate, and unsubscribe rate for each email. It also lets you see the number of people who clicked on each link and bounce reports, but through third-party integration at additional cost.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.

- **Schedule-Triggered Email:** Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method:** Emails can be sent through third-party email services, but at additional cost. Otherwise, emails are sent through clients' email servers, potentially exposing them to blacklisting.
- **Spell Checking:** The system relies on the browser's built-in spell-check functionality.

## System Querying and Reporting

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

## Roles and Permissions

- **Permissions Granularity:** You can grant individuals access to granularly view, edit, or delete data for a wide variety of system functions.
- **Field-Level Permissions:** It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** The system can be configured to provide a simpler interface for users with less-complex needs. Menu and navigation options are determined by the modules and actions the user has permission to view or edit.
- **Audit Logging:** Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.
- **User Dashboards:** Provides “dashboard” views that summarize the grants currently relevant to each individual user.
- **Users Task Lists:** Provides users with different “to-do” lists when they sign on to the system. You can configure these lists for different tasks (assigned, incomplete, overdue, etc).

- **Task Assignment:** You can assign tasks, such as reviews, to other users.
- **Board/Management View:** Provides a focused, roles-based view for management and board members.
- **Role-Based Task Assignment:** Assigns tasks to users based on rules and roles.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.
- **Custom Data Feeds:** Provides a direct ODBC database connection to allow a programmer to create custom data feeds to or from an external system.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.)
- **Existing Integrations:** Can automatically exchange data with Blackbaud's Raiser's Edge, Raiser's Edge NXT, Blackbaud CRM, Financial Edge and Financial Edge NXT, Quickbooks, and ScholarSnapp.
- **Mobile Device Application Review:** Does not explicitly support application review via mobile or tablet devices. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Grant Information Review from a Mobile Device:** Does not provide explicit functionality to let you see grant summary and grant details from a mobile or tablet device. Most tablets, however, have a screen size sufficient for viewing data and performing data entry via the device's web browser.
- **Data Integrity:** Security is handled by a secure login/password environment, with specific data within the database encrypted to provide added security. An audit trail for key data modifications allows tracking of changes to the database.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom "internal tracking" fields for staff use.
- **Custom Fields:** Lets you create custom fields that have similar permissions to system-standard fields.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms, including visual design aspects.
- **Vendor Customization:** Vendor will provide custom plug-ins, at an additional cost, to meet a client's specific needs, but most customizations are built directly into the base system.
- **System Extendability:** Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems:** Vendor permits extensively customized systems to remain on the upgrade path, unless existing tables are modified.
- **Support for Multiple Languages:** Does not let you define custom language sets based on user, group, or giving program.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** The vendor provides unlimited phone support as part of the yearly maintenance fee.
- **Online Support:** The vendor provides unlimited email support as part of the yearly maintenance fee, and an online support system on the vendor website.
- **Manuals and Documentation:** The vendor provides a .PDF user manual and help documentation files, as well as an online KnowledgeBase for frequently-asked questions..
- **Training:** The vendor offers monthly classes. It also performs annual regional training at no charge.
- **User Support Forums:** Vendor provides an online forum where users can communicate with each other.

## Installation and Maintenance

- **Installation and Maintenance:** The system can be hosted by the vendor or by various third-party services. To host the system locally, the clients need MS SQL server software, a Windows Server, and Windows Terminal Services (for remote access).

## Stability in the Market

- **History:** The vendor has been in business since 2001. The Granted GE product has been in use since 2005 and the new version of GE Spectrum has been in general use since 2012.
- **Client Base:** Fusion Labs currently has approximately 150 clients for GE Spectrum. The breakdown by not-for-profit organizations is 65 percent community foundations, 5 percent medical foundations, 25 percent religious, and 5 percent educational foundations.
- **Sustainability:** The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 10
- **Percent of Survey Respondents Who Would Recommend the System:** 60 percent
- **Training Score:** .66
- **Implementation Score:** .70
- **Support Score:** 1.26

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# GIFTINGNETWORK GIFTINGNET

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GiftingNetwork's GiftingNet, the successor to ChesterCAP DOTCHE, provides solid online application support and strong fund management, and will be of particular interest to foundations that currently use FIMS for back-office accounting. The optional Philanthropic Back Office (PBO) automatically provides daily valuations of investment pools, allowing foundations to provide up-to-date fund balances for donors and fund advisors. Online applications for both competitive grants and scholarships are built with responsive design, making it easier for applicants to fill out forms from a mobile device, while the Charitable Catalog allows grantees to use a single account to apply to grants from any foundation using the system. Support for managing grant payments, program budgets, or adding donations depends on a third-party accounting system—the vendor provides bi-directional APIs to tightly integrate the system with fund accounting systems, including Blackbaud's FIMS and FoundationPower, among others. Pricing for the base GiftingNet platform is on the lower end of systems in this report, at \$995 per month (\$11,940 per year). Pricing for the optional Philanthropic Back Office is a custom quote based on foundation assets, and includes GiftingNet.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$11,940
- **Annual Recurring cost (bare minimum):** \$11,940
- **Licensing plus all available functionality included:** Custom quote based on foundation assets
- **Annual Recurring cost (all functionality):** Custom quote based on foundation assets

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** \$11,940
- **Annual Recurring cost (bare minimum):** \$11,940
- **Licensing plus all available functionality included:** Custom quote based on foundation assets
- **Annual Recurring cost (all functionality):** Custom quote based on foundation assets

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported within the core system itself.
- **Support for Both Individual Applicants and Organizations:** The system allows for both individual applicants and organizations to apply for grants from the same grant program.
- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes and text fields without additional charges from vendor.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** Eligibility quizzes cannot branch to multiple applications.
- **Application Branching:** Grant application forms cannot branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages:** Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed.

- **Online Application Integration:** Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees:** Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History:** Lets a grantee or applicant transfer their account and history to a new staff contact from the front-facing interface.
- **Reuse of Application Data:** Carries over contact information and other appropriate data for an organization or grant from the organization profile to future applications.
- **Application Autofill from Tax Record:** Grant seekers can automatically fill in their organization profile and relevant fields in the application process by entering their EIN number, through Project Simplify's GuideStar for Grant Applications.
- **Viewing Proposal Status Online:** Applicants can view their status online.
- **Custom Confirmation Messages:** Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting:** Grantmakers can extensively format applications—for example, use rich text, create groups of questions and create multiple pages.
- **Spell Checking for Online Applications:** Grantees can easily spell-check applications.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving:** The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email. The system can be configured to support either automatic or manual approval of new profiles for grantseeking organizations.
- **Lost Credentials:** Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process.
- **Preview Packet:** The applicant can create a preview packet of their grant which includes either copies of all uploaded documents, or links to them.
- **Mobile Device Application Access:** Grantee portal views are responsively designed to be compatible with mobile browsers.
- **Duplicate Accounts:** The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers:** An applicant can use the same account for all funders in the system, through the Charitable Catalog.
- **Collaboration Between Grantseeker and Funding Organization:** The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and then work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents:** All documents and images are scanned for viruses before uploading to the system.

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation.
- **Character and Word Counts:** The system includes character and word counts for application questions. Admin users can set and adjust character and word limits for any field.
- **In-System Help for Applicants:** Clients have the ability to customize the text around an application form to provide additional instructional text. The client provides technical support for applicants.

## Application Review

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

## 501(c)(3) and OFAC Status

- **501(c)(3) Status Checking:** Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system checks against GuideStar Charity Check. You can perform this check in batch. The system includes an audit trail with time and date stamp.
- **OFAC Status Checking:** Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself. The system checks against GuideStar Charity Check. You can perform this check in batch. The system includes an audit trail with time and date stamp.
- **Manual Organization Lookup Through GuideStar:** Does not let you access GuideStar data for organizations, through Project Simplify, within the system itself.
- **Documentation for Organization Lookup and Data Initiatives:** Does not let you access GuideStar data for organizations, through Project Simplify, within the system itself.

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are supported within the core system itself.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported by the vendor's philanthropic back office system, at additional cost.
- **Creating New Funds:** New funds can be created in the foundation's accounting system and imported to the system.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) but does not enforce any actual restrictions on the use the funds.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules. This functionality relies on your accounting system.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.
- **Tracking Investment Value:** The system will automatically update the value of a fund based on investment income, through integrating with the philanthropic back office, at additional cost.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the percentage of fund investment in each pool, through integrating with back-office accounting software.
- **Investment Quick Entry:** The system has a grid or similar interface for quick entry of adjustments to funds based on investment income.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Default Payment Scheduling:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Viewing Payment Schedules:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Check Requests:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **View Scheduled Payment Amount (Annual):** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Schedule-Based Payment Viewing:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Third-Party Payee Support:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Electronic Payments:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Viewing Payments Made:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Accounting Integration:** The vendor has experience in integrating the system with external accounting software packages, including MicroEdge FIMS, FoundationPower, or other general ledger systems, potential for a one-time additional cost.
- **Automated Payment Approval Process:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).

- **Multi-Currency Support:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Multi-Currency Reporting:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Contingent/Conditional Payments:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Payment Controls:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Payment Notes:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Payment Reporting:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Grantee Portal:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Other Payment Issues:** Grant Payments are supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Budget Tracking Configuration:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Budget Amount Reporting:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Hierarchical Budget Tracking:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Budget Basing:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Multiple Programs Per Grant:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Multiyear Budgeting:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Drafting Budgets for "What-If" Scenarios:** Budgeting is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Viewing Pledges on Gift Entry:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Reminders for Pledges:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).

- **Matching Gifts:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Campaigns or Funds:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Tracking Credit for Gifts:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Organizational Gifts:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Gifts "In Honor Of" and Tributes:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Stock Gifts:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).
- **Other Gift Types:** Adding and Tracking Donations is supported by integrating between foundation's third-party accounting systems and/or vendor's Philanthropic Back Office (PBO).

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported within the core system itself.
- **Viewing Fund Balance:** Lets donors check their account balance from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make deposits from a donor portal.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of "approved nonprofits."
- **Grant Recommendations:** Lets donors select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, "office" and "cell phone"), mark the primary number and address, and track the donors' preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people's seasonal addresses, with effective dates
- **Do Not Contact?:** Lets you mark which notifications, if any, to send to a particular contact.
- **Relationships Between Donors:** Lets you track relationships between donors and funds or organizations, but not to other individuals.
- **Bi-Directional Relationships:** Lets you track relationships between donors and funds or organizations, but not to other individuals.
- **Viewing Relationships:** Lets you easily view the organizations or funds with whom a donor has relationships, but not relationships with other individuals.
- **Tracking Individual History:** Lets you keep a record of an individual's association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.
- **Tracking Business Units:** Can track individual business units under a larger organization, and see grants for both the individual units and the larger organization.
- **Multiple Contacts Per Organization:** Lets you associate multiple contacts with an organization and define their relationships to you and to a specific grant.

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

## Letters and Board Dockets

- **Overall Approach to Print Communication:** Individual letters are supported within the core system itself, using the same functionality as email. Mail merges for printing letters to multiple recipients, or to print grant summaries, are handled outside the system, by either downloading the data to merge manually, or by integrating with third-party systems.
- **Default Print Format:** Lets you define a default format for printing grant application summaries, choosing which fields to include as well as customizing fonts, colors and logos.
- **Mail-Merge Fields in Letter Templates:** Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Printing Series of Summaries:** Does not let you print letters or summaries for a series of grants or grant applications in a single step, but you can print each one individually.
- **Pre-Print Viewing and Customization:** Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Board Docket Attachments:** Lets you download mail-merge data into Microsoft Excel to manually create letters, but does not support mail-merge within the system itself.
- **Electronic Signatures:** The system supports electronic signatures with an external approval process.
- **Electronic Templates:** Lets users define templates for print and electronic formats.

## Emails

- **Overall Approach to Email Communication:** Emails are supported within the core system itself. The system can also support integrations with third-party broadcast email clients.
- **Emailing Individuals and Groups:** Lets you send email through the system to a single individual or group that meets particular criteria.
- **Email Template Flexibility:** Lets you create email to individuals and groups based on templates that include both standard text and “mail-merge” type inserted data.
- **Email Attachments:** Lets you attach files to emails sent to individuals and groups.
- **Email Delivery Reporting:** Does not let you see email delivery statistics. This is possible if integrating with a third-party broadcast email client, at additional cost.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email:** Lets you set up and send scheduled reminder emails to applicants and grantees.
- **Outbound Email Method:** Emails are sent through the vendor’s email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking:** Lets you spell check emails within the system.

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification:** Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs.
- **Fund Statements:** The system can automatically generate fund statements using pre-packaged templates.
- **Donor Management Reports:** The system provides a limited number of pre-packaged standard reports for common fundraising and donor management needs.
- **Favorite Reports, Queries, and Actions:** Lets you quickly view favorite reports without navigating a much-larger set.
- **Saving Modified Reports:** Lets you name and save reports that you create or modify.
- **Ad Hoc Reporting:** Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting.
- **Grant Summary Tracking:** Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability:** Virtually all system data—including data entered into online applications, review forms and grantee progress reports—can be included in reports.
- **Report Drill-Down:** Does not let you drill down on reports.
- **Attachment Searching:** Does not let you search within attached documents.
- **Automating Reports:** Lets you setup reports to automatically run and send to individuals or groups.
- **Visual Reports:** Lets you create, view, and export data in a visual graphic representation such as charts and graphs.
- **User Dashboards:** Provides “dashboard” views which summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates:** The system does not contain report templates to easily align data with reporting standards used by the sector, such as Foundation Center eReporting Excel format, or Reporting Commitment hGrant format, or the Columbus Survey.

## Roles and Permissions

- **Permissions Granularity:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions:** You can define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging:** Records the 100 most recent data transfers through the API, along with the data, in an audit log.
- **User Dashboards:** Provides “dashboard” views which summarize the grants currently relevant to each individual user.
- **Users Task Lists:** Does not provide users a task list upon sign on.
- **Task Assignment:** You can assign tasks, such as reviews, to other users.
- **Board/Management View:** Provides a focused, roles-based view for management and board members which can be customized to meet specific organizational needs.
- **Role-Based Task Assignment:** Assigns tasks to users based on rules and roles.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data.

- **Custom Data Feeds:** Provides an Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Third-party Automation Support:** The vendor provides a library of published APIs for a variety of third-party systems.
- **Existing Integrations:** Can automatically exchange bi-directional data with MicroEdge FIMS and FoundationPower.
- **Mobile Device Application Review:** Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device:** Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity:** The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom “internal tracking” fields for staff use.
- **Custom Fields:** Lets you create custom fields that have similar permissions to system-standard fields and tracks their creation and history in the audit trail.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization:** Vendor will extensively customize system to your needs, at additional cost.
- **System Extendability:** Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems:** Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages:** Lets you define custom language sets for admin users and reviewers based on user, group, or giving program.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides unlimited phone support without additional cost.
- **Online Support:** Vendor provides unlimited online support without additional cost.
- **Manuals and Documentation:** The vendor provides both a user manual with screenshots and detailed instructions for using the system, and online documentation via a wiki, which enables collaboration between users and the support team. Additionally, the vendor provides a library of online training videos for all users.
- **Training:** The vendor provides initial training via the internet at no additional cost, and additional training sessions can be scheduled.
- **User Support Forums:** There are user support forums or discussion groups available.

## Installation and Maintenance

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

## Stability in the Market

- **History:** The vendor has been in business since 2005; the system has been in use by clients since 2005, when the predecessor company purchased the platform. There have been three major software releases since 2005.
- **Client Base:** The vendor has declined to comment.
- **Sustainability:** The vendor has declined to comment.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

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

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# STELLAR TECHNOLOGY SOLUTIONS IPHI SUITE

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Stellar Technology Solutions' iPhi suite provides robust functionality for community foundations within a central, integrated suite of components. The applicant and donor portals support access from such mobile devices as smartphones or tablets through a dedicated mobile-friendly interface, which can be toggled on and off. Fund management is especially strong—iPhi is one of the few systems in this report that automatically provides daily valuations of investments pools, and investment income can be distributed to funds automatically. The fundraising functionality, however, may not be the best fit for foundations actively raising donations from individual donors. Pledge installments must be scheduled manually, and staff need to run a report to see pledges that are due soon. But donors can make single or recurring deposits to their fund(s) directly from the donor portal, and the system provides useful donor cultivation features beyond the scope of this report. Relationship management and support for letters or other print communication is solid, but you'll need to find a third-party broadcast email client to support any email marketing efforts. Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.

## Pricing

For a small organization (five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, \$1,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Annual Recurring cost (bare minimum):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Licensing plus all available functionality included:** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Annual Recurring cost (all functionality):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.

For a large organization (20 named users, 10 concurrent users, 50 external reviewers, \$500,000,000 asset base, \$10,000,000 awarded per year):

- **Base licensing cost for system (bare minimum):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Annual Recurring cost (bare minimum):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Licensing plus all available functionality included:** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.
- **Annual Recurring cost (all functionality):** Pricing for the system is determined by the components and level of customization required—foundations should contact the vendor for a custom quote.

## Online Applications

- **Overall Approach to Online Applications:** Online Applications are supported within the core system itself.
- **Support for Both Individual Applicants and Organizations:** By default, the system does not allow both individual applicants and organizations to apply for grants from the same grant program. The vendor reports that this is possible through customization.

- **Creating Online Applications:** Lets you create new online applications with, at a minimum, file uploads, dropdown boxes, checkboxes and text fields without additional charges from vendor.
- **Number of Online Application Forms:** Lets you create different online forms to support each grant program.
- **Eligibility Branching:** Eligibility quizzes can branch to multiple applications.
- **Application Branching:** Grant application forms can branch—for example, to show a different set of questions for fiscal-sponsored organizations than 501(c)(3) organizations.
- **Support for Multiple Stages:** Supports multiple application stages, including an automatically scored eligibility quiz, a Letter Of Intent stage, a more detailed proposal stage and as many other stages as needed.
- **Online Application Integration:** Data from online applications is automatically pulled into the core grants management system—no download or upload of data files is required.
- **Multiple Logins for Grantees:** Supports multiple logins for grantees on a single application—for example, allows separate people to complete financial sections and proposal sections.
- **Transfer of Account and History:** Grantseeker accounts and application history are part of the organization record, not the individual grantseeker. Individuals can request access to an organization's account history, with foundation approval.
- **Reuse of Application Data:** Carries over contact information and other appropriate data for an organization or grant from the organization profile to future applications.
- **Application Autofill from Tax Record:** Grant seekers cannot automatically fill in their organization profile by entering their EIN number.
- **Viewing Proposal Status Online:** Applicants can view their status online.
- **Custom Confirmation Messages:** Lets you customize a confirmation message to be sent upon submission of an application.
- **Application Formatting:** Grantmakers can extensively format applications—for example, use rich text, create groups of questions and create multiple pages.
- **Spell Checking for Online Applications:** The system relies on the browser's built-in spell-check functionality.
- **Saving Incomplete Applications:** Applicants can save partially completed applications and return to them later.
- **Application Auto-Saving:** The system does not automatically save applications in progress, but information is saved when the applicant navigates between sections.
- **User Registration:** System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.
- **Lost Credentials:** Both applicant and grantmaker can quickly and easily reset lost credentials.
- **Viewing Applications:** Applicants can easily view or print applications at any stage in the process.
- **Preview Packet:** The preview packet does not include uploaded documents. Applicants can access the individual attachments from the application portal.
- **Mobile Device Application Access:** The system provides a dedicated mobile interface for applications.
- **Duplicate Accounts:** The system checks the email address of each new registrant to make sure it doesn't already exist in the system and prompts the registrant if there is a match. There is a process for grant makers to review applicants to look for duplicates on the back end.
- **Unified Accounts Across Grantmakers:** There's no means of applicants or grantees to manage all grant information for all funders in the system from a unified account.
- **Collaboration Between Grantseeker and Funding Organization:** The system allows reviewers to unsubmit a proposal with comments or request additional information from the applicant, and then work back and forth until a proposal is complete.
- **Security Scan for Uploaded Documents:** All documents and images are scanned for viruses before uploading to the system.

## Form Design and Flexibility

- **Look and Feel:** Lets you customize online application forms to match the look and feel of your website, including colors, fonts and navigation, but requires in-depth knowledge of HTML and style sheets. Look and feel customization is typically performed by the vendor during initial setup.
- **Character and Word Counts:** The system includes character counts, but not word counts, for application questions. Admin users have the ability to set maximum character limits for each field.
- **In-System Help for Applicants:** Clients have the ability to customize the text around an application form to provide additional instructional text.

## Application Review

- **Overall Approach to Application Review:** Application Review is supported within the core system itself.
- **Viewing Relationship History:** Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for, been declined or been granted in the past.
- **Requirements Checklist:** Supports checklist functionality to define what information or documents you require from prospective grantees.
- **Reopening Submitted Applications:** Lets you reopen online applications once they've been submitted if more information is required from the applicant.
- **Printing Grant Summaries:** Reviewers can easily print grant summaries or full grant information.
- **Reviewer's Portal:** Provides a simplified “portal” interface to allow reviewers to see and review grant applications more easily.
- **Viewing Files:** The system lets reviewers easily view selected documents associated with the request and stored in the system.
- **Grant Review Workflows:** Lets you define automatic steps and rules, or “workflow,” for the grants review process.
- **Multiple Reviewer Support:** Multiple reviewers can each rate an application on a number of different factors, and add comments.
- **Scoring Flexibility:** Supports different information or scoring schemes for different programs.
- **Online Application Review:** Supports online viewing and reviewing of applications.
- **External Reviewer Profiles:** Lets track external reviewers abstain from reviewing a particular application and record a conflict of interest, but does not provide any specific functionality to help you assign applications for review based on these criteria.
- **Comment Sharing Among Reviewers:** Lets you choose whether to allow reviewers to see each other's comments and grades.
- **Numeric Review Scores:** Lets you view numeric review scores and report them as summary statistics—for example, average score.
- **Review Status Notification:** Proposal owner and grants management staff can be automatically notified when reviews are completed.

## 501(c)(3) and OFAC Status

- **501(c)(3) Status Checking:** Automatically checks Employee Identification Numbers against a standard 501(c)(3) non-profit registry, and flags those not listed. The system checks against the IRS Business Master File and Publication 78, and automatically fills in related fields for legal name and NTEE code.
- **OFAC Status Checking:** Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself.
- **Manual Organization Lookup Through GuideStar:** Does not let you access GuideStar data for organizations, through Project Simplify, within the system itself.

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

## Scholarships

- **Overall Approach to Scholarships:** Scholarships are supported within the core system itself.
- **Online Scholarship Applications:** Scholarship application can be completed online via the grant application portal.
- **Awards to Individuals and Organizations:** The system allows scholarships to be awarded to either individuals directly, or to the academic institution.
- **Online Review and Evaluation:** Scholarship applications can be reviewed by both internal staff and external reviewers.

## Fund Management

- **Overall Approach to Fund Management:** Fund Management is supported within the core system itself.
- **Creating New Funds:** Lets the grant manager easily create a new fund by selecting the type of fund, the restrictions, and the fee structure.
- **Multiple Funds:** Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.
- **Enforcing Fund Restrictions:** Lets donors specify fund restrictions (as per a comment field) but does not enforce any actual restrictions on the use the funds.
- **Fund Balance:** It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.
- **Spending Policy:** The system calculates the suggested annual payout for a fund, given defined spending rules.
- **Multi-Fund Reporting:** Lets you set separate reporting schedules for each fund.
- **Opportunity Matching:** Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests. Matching opportunities can then be promoted to an individual donor's donor portal.
- **Tracking Investment Value:** The system will automatically update the value of a fund based on investment income by tracking the daily values of securities within the back-office accounting system.
- **Investment to Fund Association:** Funds can be associated with one or many investment pools. The system tracks the percentage of fund investment in each pool, through the integrated back-office accounting software.
- **Investment Quick Entry:** Foundation staff can run an income distribution report which will calculate and automatically distribute the investment income to each fund. This process can be scheduled to run automatically, without the involvement of foundation staff.

## Payments

- **Overall Approach to Payments:** Grant Payments are supported within the core system itself.
- **Default Payment Scheduling:** Lets you define a payment schedule individually for each grant, but not a default that applies to all of them.
- **Viewing Payment Schedules:** Lets you see what scheduled payments are upcoming and whether the grantee has met the requirements linked with that conditional payment.
- **Check Requests:** Can generate a paper check request for accounting.
- **View Scheduled Payment Amount (Annual):** Can view the amount scheduled to be paid out in a given year, including payments for grants awarded in previous years.
- **Schedule-Based Payment Viewing:** Lets you see what payments are due based on a schedule, and whether the grantee has met the associated prerequisite requirements.
- **Third-Party Payee Support:** Supports payments to individuals or organizations other than the primary grantee (for example, fiscal sponsors).

- **Electronic Payments:** Supports ACH payments and wire transfers by storing required information and confirmation codes for successful transactions.
- **Viewing Payments Made:** Lets you see what payments have been made, including amount, date paid and check/ACH payment/wire transfer number.
- **Accounting Integration:** Includes a robust, integrated real-time accounting package and can also integrate tightly with an external accounting package, if needed.
- **Automated Payment Approval Process:** Supports an automated payment approval process with configurable workflow steps.
- **Multi-Currency Support:** Only supports grants in a single currency.
- **Multi-Currency Reporting:** Lets you report on grants and payments in whichever currency the system is configured to use.
- **Contingent/Conditional Payments:** Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.
- **Payment Controls:** Lets you configure audit/security controls to ensure that only certain staff can change payment information.
- **Payment Notes:** Lets you include notes on payments, which can be private to certain users or usable for all.
- **Payment Reporting:** Lets you reports on payments which carries coding attributes of associated requests, organizations, and contacts.
- **Grantee Portal:** Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.
- **Other Payment Issues:** The system provides the ability to void or place holds on payments in the system, refund payments, update payment details in batch, and create payments in batch. Users cannot track in-kind and quid pro quo payments.

## Budgeting

- **Overall Approach to Budgeting:** Budgeting is supported within the core system itself.
- **Budget Tracking Configuration:** You can decide whether the budgeting features track the amount paid out in a particular year or the total amount awarded.
- **Budget Amount Reporting:** Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).
- **Hierarchical Budget Tracking:** Budgets can be tracked in hierarchically defined categories or program areas.
- **Budget Basing:** Lets you use previous years' budgets as a base and adjust them for current year.
- **Multiple Programs Per Grant:** Can split grants across more than one program for budgeting and payment-tracking purposes.
- **Multiyear Budgeting:** Does not easily let you set up multi-year budgeting.
- **Drafting Budgets for “What-If” Scenarios:** Does not let you set up “what-if” scenarios -- budget values are automatically calculated in real-time.

## Adding and Tracking Donations

- **Overall Approach to Adding and Tracking Donations:** Adding and Tracking Donations is supported within the core system itself.
- **Adding a Gift:** Adding a single gift into the system is a straightforward process of finding a donor and filling out fields. Donor gift receipt letters are automatically generated for any type of gift and can be displayed on the donor portal.
- **Importing Gifts:** Lets you easily map and import donor and gift information in custom file formats.
- **Adding Pledges:** Lets you enter pledges for future gifts, including the amount and scheduled date. The system can create a full set of pledges based a payment schedule, which you can then customize as needed.
- **Viewing Pledges on Gift Entry:** When using the interface to add new gifts, you can easily see existing pledges and apply gifts against them, but you are not specifically asked to do so.

- **Reminders for Pledges:** Lets you run a report to see pledges that are near due, but staff members are not proactively notified or you can manually set a reminder to be proactively notified about a pledge.
- **Matching Gifts:** Lets you track matching gifts that need to be claimed from an employer through a feature that can automatically create a pledge against the employer when you enter the gift to be matched.
- **Campaigns or Funds:** Lets you assign gifts to a particular source, campaign or fund, or split the gift across multiple of these, as well as to track the solicitation and sub-solicitation that generated a gift.
- **Tracking Credit for Gifts:** Lets you assign credit in the database for bringing in a gift to as many staff members or other people as you like.
- **Organizational Gifts:** Lets you associate gifts with an organization as opposed to individuals.
- **Gifts “In Honor Of” and Tributes:** Lets you track gifts given “in honor of,” and tributes. Can designate honorees and set notifications for honorees and donors. Can generate letters to honorees.
- **Stock Gifts:** The system can track both the unsold and sold values of stock gifts.
- **Other Gift Types:** Supports tracking of tribute gifts, bequeathments, in-kind or other gifts.

## Donor Portal

- **Overall Approach to Donor Portal:** The donor portal is supported within the core system itself. Gift and grant transactions made from the donor portal are brought into the CoreEnterprise system automatically.
- **Viewing Fund Balance:** Lets donors check their account balance, with real-time updates, from a donor portal. Donors can view historical statements from throughout the life of their fund(s).
- **Online Fund Deposits:** Lets donors make single or recurring deposits from a donor portal. The donor portal supports deposits made by credit or debit card or by e-checks.
- **Viewing Grant Opportunities:** Lets donors browse through a foundation provided list of “approved nonprofits.” Donors also have the ability to browse GuideStar listings from the portal and maintain a list of saved nonprofits.
- **Grant Recommendations:** Lets donors select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria.
- **Viewing Grant History:** Lets donors view their account statements and grant history from a donor portal. Donors have the option to renew previously awarded grants from their giving history.

## Relationship Management

- **Overall Approach to Relationship Management:** Relationship Management is supported within the core system itself.
- **Multiple Contact Methods:** Lets you track as many phone numbers and addresses as you like, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the donors’ preferred contact method.
- **Multiple Addresses:** Lets you specify which address should be used for certain types of mailings.
- **Seasonal Addresses:** Lets you track people’s seasonal addresses, with effective dates, and automatically switches primary addresses for the appropriate timeframe.
- **Do Not Contact?:** Lets you mark that a particular person should not be contacted, but staff must check a particular field to see it.
- **Relationships Between Donors:** Lets you track relationships between donors, and label them (for example, “family member,” “co-worker”) with custom relationship types.
- **Bi-Directional Relationships:** Lets you define relationships between donors as one-way (“would like to meet”), two-way (“spouse”) or directional (“boss; works for...”), and automatically assigns the appropriate relationships for both donors.
- **Viewing Relationships:** Lets you easily view everyone with whom a donor has relationship including the degrees of separation between everyone in the database.
- **Tracking Individual History:** Lets you keep a record of an individual’s association with a record, even if they leave, for historical and audit purposes, and they will not show up as an active contact for communications.
- **Tracking Organizational Grant History:** Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.

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

## Letters and Board Dockets

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

## Emails

- **Overall Approach to Email Communication:** Emails to individual recipients are sent by the user's external email system. Broadcast email is not supported within the system--a foundation must export a list of recipients to add to a third-party broadcast email client, at additional cost. Transactional emails, including receipts for contributions, are generated within the core system itself.
- **Emailing Individuals and Groups:** Lets you easily send an email to a particular individual, but not to a group of people at once.
- **Email Template Flexibility:** Lets you create email to individuals based on templates that include both standard text and "mail-merge" type inserted data, but not to a group of people at once.
- **Email Attachments:** Does not let you attach files to emails.
- **Email Delivery Reporting:** Does not let you see email delivery statistics.
- **Event-Triggered Email:** Lets you set up and send automatic emails based on certain events, such as online application submission.
- **Schedule-Triggered Email:** Does not let you set up scheduled email reminders to applicants and grantees.
- **Outbound Email Method:** Emails are sent through the vendor's email service to protect you from blacklisting, and the vendor takes a series of steps to ensure email is not flagged as spam.
- **Spell Checking:** The system relies on the browser's built-in spell-check functionality.

## System Querying and Reporting

- **Overall Approach to Reporting:** Reporting functionality is provided within the core system itself. Pre-built standard reports are found in the reports section of each component -- i.e. to run a grant report, the user must navigate to the “Grants” component. Casual users can easily run queries and retrieve reports independently with minimal training.
- **Searching and Filtering:** Lets you search or filter to find a particular set of grants based on status, program and cycle, and view pre-packaged reports based on this customized set of grants.
- **Report Modification:** Can make small updates to standard reports—for example, to change the columns displayed, or the grouping—to meet slightly different needs. Many, but not all, reports allow users to save their custom formatting as a “Layout”, which can then be shared and reused.
- **Fund Statements:** Lets you easily generate fund statements using pre-packaged templates.
- **Donor Management Reports:** The system provides pre-packaged standard reports for common fundraising and donor management needs.
- **Favorite Reports, Queries, and Actions:** Cannot quickly view favorite reports without navigating a much-larger set. It is possible to save search criteria and the column and grouping settings (called a layout in the system) for future reports.
- **Saving Modified Reports:** Does not let you name and save reports that you create or modify. It is possible to save search criteria and the column and grouping settings (called a layout in the system) for future reports.
- **Ad Hoc Reporting:** Supports ad hoc reports, which can include nearly any field displayed to users, by exporting data to Excel for formatting. It is possible to save search criteria and the column and grouping settings (called a layout in the system) for future reports.
- **Grant Summary Tracking:** Can track summaries based on hierarchical codes—for example, to show grant money paid to each Education sub-program as well as total Education grants.
- **Data Reportability:** Virtually all system data—including data entered into online applications, review forms and grantee progress reports—can be included in reports.
- **Report Drill-Down:** Lets you drill down for more information on some or all reports.
- **Attachment Searching:** Lets you search the contents of file attachments.
- **Automating Reports:** Reports cannot currently be set to automatically run and send to individuals or groups. The vendor reports that this functionality will be available as of their September 2017 release.
- **Visual Reports:** There is no ability in the system to create charts or graphs from report results within the system itself. Report results can be exported to a spreadsheet for additional formatting or calculations.
- **User Dashboards:** Provides “dashboard” views for each fund, individual, and organization record, but the system does not provide “dashboard” views to summarize the grants currently relevant to each individual user.
- **Industry-Standard Reporting Templates:** The system contains report templates to easily align data with reporting standards used by the sector, including the Foundation Center eReporting Excel format

## Permissions & Workflow

- **Permissions Granularity:** You can grant individuals access to granularly view, edit or delete data for a wide variety of system functions.
- **Field-Level Permissions:** It is not possible to define user or group permissions on a field-by-field basis.
- **Role-Based Interfaces:** Can provide a role-specific internal interface for each role in the systems—for example, an admin view, a board view, program staff view and a reviewer view—to provide a simpler experience for users with less-complex needs.
- **Audit Logging:** Records the majority of data updates, along with the data and the user who made the update, in an audit log.
- **User Dashboards:** All users see the same view of information; no “dashboard” views are available.
- **Users Task Lists:** Provides users a “task list” when they sign onto the system.

- **Task Assignment:** You can assign tasks, such as reviews, to other users.
- **Board/Management View:** Provides a standard focused, roles-based view for management and board members.
- **Role-Based Task Assignment:** Assigns tasks to users based on rules, roles, and by user group.

## Data Access

- **Data Export:** Lets you export all data visible to users into another file format, such as .XLS or .CSV.
- **Data Import:** Lets you map different files of donor and gift information to the proper fields in the system, and import the data. The vendor provides standard templates to aid with importing data.
- **Custom Data Feeds:** Provides a bi-directional Application Programming Interface (API) to allow a programmer to create custom data feeds to or from an external system.
- **Third-party Automation Support:** Does not support end-user focused API automation platforms (e.g. IFTTT, Zapier, etc.).
- **Existing Integrations:** The vendor has built integrations between the system and third-party systems, including CRM and trust and portfolio management systems.
- **Mobile Device Application Review:** Provides an interface specifically designed to see, code, approve and add review comments from a mobile or tablet device.
- **Grant Information Review from a Mobile Device:** Provides an interface specifically designed to let you see grant summaries and details from a mobile or tablet device.
- **Data Integrity:** The vendor provides robust documentation regarding their security, which highlights the redundancy of the data stored on its servers.

## Overall Customization

- **Dropdown Fields:** Lets you customize dropdown values for fields such as program or grant code.
- **Internal Tracking Fields:** Lets you add custom “internal tracking” fields for staff use.
- **Custom Fields:** Lets you create custom fields that have similar permissions to system-standard fields.
- **Online Information Customization:** Lets you customize the information requested in online applications and review forms at no additional cost.
- **Vendor Customization:** Vendor will extensively customize system to your needs, at additional cost.
- **System Extendability:** Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).
- **Support for Customized Systems:** Vendor permits extensively customized systems to remain on the upgrade path.
- **Support for Multiple Languages:** Lets you define custom language sets for standard system communications, including system-generated letters, emails, and reports.
- **Customization by Foundation Staff:** Almost all configuration or customization as described above can be performed by the user, without involvement from the vendor.

## Ease of Use

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

## Support and Training

- **Phone Support:** Vendor provides a dedicated account manager for each client, with unlimited phone support without additional cost.
- **Online Support:** Vendor provides a dedicated account manager for each client, with unlimited email support without additional cost.
- **Manuals and Documentation:** The system includes a detailed, online user guide with step-by-step instructions. The user guide is regularly updated after each system update.
- **Training:** The vendor provides initial training in person or via the internet at no additional cost, and additional online training sessions can be scheduled.
- **User Support Forums:** There are user support forums or discussion groups available.

## Installation and Maintenance

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

## Stability in the Market

- **History:** The vendor has been in business since 1999; the system has been in use by clients since 2001.
- **Client Base:** The vendor reports that they have 87 direct clients, 43 of which are community foundations.
- **Sustainability:** The revenue earned from the grantmaking system currently covers the personnel and operational expenses required to support it.

## Customer Experience Survey

Survey respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. The full text of the survey appears in Appendix C.

- **Number of Survey Respondents Who Reported Using the System:** 9
- **Percent of Survey Respondents Who Would Recommend the System:** 75 percent
- **Training Score:** .16
- **Implementation Score:** .65
- **Support Score:** .89

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# APPENDICES

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# APPENDIX A: RESEARCH METHODOLOGY

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## Product Selection

We interviewed five community foundation staff members and two consultants who specialize in software for community foundations to learn how the needs of community foundation differ from those of private foundations. Based on those interviews, we established the selection criteria for solutions that would be appropriate for community foundations.

To be eligible for inclusion, systems must provide full lifecycle grants management capability, and the ability for staff to be able to track dozens of funds and be able to view the existing balance of each based on both incoming and outgoing funds.

In addition, each system had to provide at least two of the following features, without use of third-party tools:

- Support the creation and management of multiple funds from which grants or other awards can be made, without custom development.
- Support creating and tracking a yearly budget for each fund.
- Support at least one online application form (or integrate closely with a third-party application platform).
- Record a status for each application received to easily see which applications have been awarded (or integrate closely with a third-party application platform).

We started with a list of grants management systems that included products known to Idealware, TAG, and PEAK Grantmaking and the consultants and community foundation staffers interviewed, as well as all vendors included in the May 2016 edition of *A Consumers Guide to Grants Management Systems*.

Ultimately we invited seven grant management vendors representing eight systems to complete a questionnaire to determine their solutions' eligibility for this report.

In June 2017, Idealware participated in detailed online software demos of the eight systems conducted by their vendors. Following that process, Idealware determined that one of them, Social Solutions' Apricot for Funders, did not meet the requirements for inclusion in the final report. This is not a statement about the functionality of the system itself, but on the focus on this report on solutions that provide tight programmatic integration among components.

Based on feedback from a group of subject matter experts, we also solicited a demonstration of an additional solution by one of the included vendors, bringing the total number of systems reviewed back to eight.

## Evaluation Criteria

We started with the categories and criteria used in *A Consumers Guide to Grants Management Systems* and *A Consumers Guide to Low-Cost Donor Management Systems*. Informed by interviews with community foundation staff, we eliminated criteria less important to community foundations and modified others to make them more relevant to this report. We also added criteria and whole categories to reflect the needs of community foundations that extend far beyond grants management—for instance, in the Fund Management and Donor Portal categories.

In June 2017, Idealware participated in detailed online software demos of the eight solutions conducted by their vendors, evaluating them against 199 criteria. The results for each solution were sent to the vendors to allow them to define any errors of fact. The review text was updated in areas where the vendor could demonstrate that the text was incorrect, and then published in the Detailed System Reviews section of this report.

The scores in our features comparison matrix are based on a rubric derived from our evaluation criteria and based on our interviews. See Appendix B to view this scoring rubric.

## Customer Experience Survey

In June 2017, Idealware distributed a customer experience survey through the lists of the PEAK Grantmaking and TAG community, as well as directly to the vendors of the grants management systems included in this review. From that outreach, 115 people took the survey. In each system review, we include information about how many people reported using the software and a score based on their reported experience. Respondents were asked a series of questions related to Training, Implementation, and Support. We determined the score by averaging responses to all questions in each category for each system's users. Scores range from -2 to 2, with a score of 2 representing a perfect score with all respondents reporting a positive vendor experience. (The full text of the survey appears in Appendix C.)

For many systems, the sample size was very small — this survey should not be taken as a rigorously scientific research method. It's our hope that the survey represents a different facet of the software landscape than the function-based reviews.

# APPENDIX B: HOW WE EVALUATED THE SYSTEMS

## Grant And Scholarship Applications

Online Applications—Grantmaker Experience			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you collect application information online and view it.</li> <li>Can include custom dropdowns and text fields in applications.</li> <li>Lets applicants upload files as part of their application.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Can include, at a minimum, file uploads, dropdowns, checkboxes, and text fields in application fields.</li> <li>Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, and/or a more detailed proposal stage.</li> <li>Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required.</li> <li>Supports multiple logins for grantees on a single application. OR, grant application forms can branch at all stages, possibly through customization.</li> <li>There is a virus scan or security feature to prevent malicious files from being uploaded onto the application or downloaded onto the system.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you create new online applications without additional charges from vendor.</li> <li>Lets you customize a confirmation message to be sent upon submission of an application.</li> <li>Lets applicants upload a wide variety of files as part of their application.</li> <li>The system allows both individual applicants and organizations to apply for grants from the same grant program.</li> <li>Supports multiple logins for grantees on a single application, AND grant application forms can branch at all stages, possibly through customization.</li> <li>Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, a more detailed proposal stage, and as many other stages as needed.</li> </ul>

## Online Applications—Grantseeker Experience

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<p>EITHER:</p> <ul style="list-style-type: none"> <li>Lets applicants view their status online.</li> <li>System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.</li> </ul> <p>OR:</p> <ul style="list-style-type: none"> <li>Grantee portal views are responsively designed to be compatible with mobile browsers.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets applicants save their application and return to it at a later point.</li> <li>Carries over contact information and other appropriate data for an organization or grant from one year’s application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn’t have to be re-entered in a proposal.</li> <li>Applicants can easily view or print applications at any stage in the process.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Both applicant and grant-maker can quickly and easily reset lost credentials.</li> <li>The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.</li> <li>The system checks the email address of each new registrant to make sure it doesn’t already exist in the system, and prompts the user if it is a duplicate.</li> <li>Eligibility quizzes can branch to multiple applications.</li> <li>Grant seekers can automatically fill in their organization profile by entering their EIN number or from a previously-submitted application. OR, Applicants can collaborate with a reviewer on a proposal to address comments or suggestions within the system itself, prior to submitting the final application.</li> </ul>

## Form Design & Flexibility

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you, or the vendor, customize online application forms with your logo, at a minimum.</li> <li>Lets you adjust character or word counts for at least some fields in online forms.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you adjust character or word counts for all fields in online forms.</li> <li>Lets you adjust character or word count, and displays prominently how many characters remain on a field.</li> <li>Lets you customize in-system help for applicants or grantees. OR, Vendor can customize in-system help for applicants or grantees. OR The vendor provides technical support for applicants.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you, or the vendor, customize online application forms to match the look and feel of your website, including colors, fonts, and navigation, at no additional cost.</li> <li>Lets you adjust word as well as character count, and displays prominently how many words or characters remain on a field.</li> <li>In-system help is customizable (by you or by the vendor) in the form of online videos, FAQs, wikis, or another sophisticated option.</li> </ul>

# Application Review

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Supports at least a single review comment and rating for each application.</li> <li>Lets reviewers easily print grant summaries or full grant information.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you see a history of a relationship with prospective grantees—for example, what grants they’ve applied for or been given in the past.</li> <li>External or internal reviewers can print grant summaries or full grant information (including attachments).</li> <li>Lets multiple reviewers each rate an application, with at least one comment and one numeric grade for each application.</li> <li>Provides a simplified “portal” interface to allow reviewers to see and review grant applications without navigating the full grants management interface.</li> <li>Proposal owner and management staff can be automatically notified when reviews are completed, either via email or within the system.</li> <li>Supports checklist functionality to define what information or documents you require from prospective grantees. OR, provides strong online application functionality, including the ability to reopen online applications once they’ve been submitted if more information is required from the applicant.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets multiple reviewers each numerically rate an application on a number of different factors, and add comments.</li> <li>Supports different information or scoring schemes for different programs.</li> <li>Supports online viewing and reviewing of applications.</li> <li>Lets you track external reviewers’ interests, potential conflicts of interest, and geographic location or area of expertise and use those criteria to assign applications for review.</li> <li>Lets reviewers see each other’s comments and grades, if you allow it.</li> <li>Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.</li> <li>Lets you define automatic steps and rules, or “workflow,” for the grants review process.</li> <li>Supports checklist functionality to define what information or documents you require from prospective grantees.</li> </ul>

## 501(c)(3) and OFAC Status

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you click on organizations to view their record and tax status in a standard registry of 501(c)(3) nonprofits, such as GuideStar.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you create a list of organizations in a format that can easily be used to check them against standard OFAC and other terrorist watch lists, potentially in a different system.</li> <li>The tax status automatic check includes auto population of related fields for legal name, EIN, and tax status.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Automatically checks Employee Identification Numbers against a standard 501(c)(3) nonprofit registry, and flags those not listed.</li> <li>Lets you compare organizations and individuals against standard OFAC and other terrorist watch lists within the grants management system itself.</li> <li>Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s).</li> <li>Lets you perform checks and updates in batch. OR, the vendor will perform checks and updates in batch for you.</li> </ul>

## Scholarships

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Scholarship applications can be completed online.</li> </ul>	<ul style="list-style-type: none"> <li>The system allows scholarships to be awarded to either individuals directly, or to his/her academic institution.</li> </ul>	<ul style="list-style-type: none"> <li>Applicants can apply online for scholarships via dedicated application portal.</li> <li>Scholarship applications can be reviewed by both internal staff and external reviewers.</li> </ul>

## Financial Management

### Fund Management

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>It's easy to see the current fund balance for any fund, with a record of incoming and outgoing money.</li> <li>Lets you set up multiple funds from which to grant, and to maintain separate restraints and requirements for each.</li> <li>Lets the grant manager easily create a new donor-advised fund.</li> <li>Funds can be associated with one or many investment pools.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus at least THREE of the following:</p> <ul style="list-style-type: none"> <li>The system calculates the suggested annual payout for a fund, given defined spending rules.</li> <li>Lets grant managers search to find restricted funds that match desired grant opportunities based on donor interests.</li> <li>Lets you set separate reporting schedules for each fund.</li> <li>Allows a foundation staff person to easily update the value of a fund based on investment income.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets donors specify fund restrictions which the system monitors and, at a minimum, shows a warning if a restriction is violated.</li> <li>The system tracks the percentage and cash value of fund investment in each pool.</li> <li>The system has a grid or similar interface for quick entry adjustments to funds based on investment income.</li> <li>The system will automatically update the value of a fund based on investment income, potentially at additional cost.</li> </ul>

# Grant Payments

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you define a payment schedule for each grant.</li> <li>Lets you see what scheduled payments are upcoming.</li> <li>Lets you see what payments have been made, including amount, date paid, and check number.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Can generate a report of the amount scheduled to be paid out in a given year (including carryover from previous years' grants).</li> <li>Lets you see upcoming scheduled payments and whether the grantee has met requirements linked with that payment.</li> <li>Supports payments to organizations other than the primary grantee (for example, fiscal sponsors).</li> <li>Supports grants in a single currency. OR, allows for payments to be made contingent or conditional upon a specified grant or payment requirement.</li> <li>Lets you pull reports on payments which carry coding attributes of associated requests, organizations, and contacts.</li> <li>Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule can display either paid or upcoming payments, but not both.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>The vendor has experience in integrating with at least one external accounting software package (if the accounting system is not built in).</li> <li>Can generate a paper check request for accounting.</li> <li>Lets you include a note on a payment.</li> <li>Supports wire transfers by storing required information and confirmation codes for successful transactions.</li> <li>Supports grants made in multiple currencies by storing currency and exchange rate information.</li> <li>Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.</li> <li>Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.</li> <li>Lets you configure audit or security controls to ensure that only certain staff can change payment information.</li> <li>Supports an automated payment approval process with configurable workflow steps.</li> <li>Lets you void payments, make refunds, and place payments on hold, which are attached to workflows within the system.</li> <li>There is the ability to update payment details and create payments (e.g., general ledger account, fund, etc.) in batch. OR, there is the ability to track quid pro quo and in kind payments.</li> <li>Grantees can view the payment schedule for their award(s) online through the grantee portal. The schedule displays both paid and upcoming payments.</li> </ul>

## Budgeting

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you track either the amount awarded or the amount budgeted in a particular year.</li> <li>Budgeting is supported within the core system itself at no additional cost.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Can split grants across more than one program for budgeting purposes. OR, Lets you use previous years' budgets as a base and adjust them for current year.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Can track budgets in hierarchically defined categories or program areas, potentially through customization.</li> <li>Lets you enter a budget amount for each grants program and report on that information with actuals (approved and pending).</li> <li>And at least TWO of the following:               <ul style="list-style-type: none"> <li>Lets administrators view the impact a particular grant will have on future year payouts with a "what if" type feature.</li> <li>Lets you choose whether to track either the amount awarded or the amount budgeted in a particular year.</li> </ul> </li> <li>Can split grants across more than one program for budgeting purposes.</li> </ul>

## Donor Management

### Adding and Tracking Donations

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>The system supports adding and tracking individual donations, potentially through integration with a separate product at additional cost.</li> <li>Adding a single gift into the system is a straightforward process of finding a donor and filling out fields.</li> </ul>	<ul style="list-style-type: none"> <li>The system supports adding and tracking individual donations within the core system itself, at no additional cost.</li> <li>Lets you enter pledges for future gifts, including the amount and scheduled date.</li> <li>Lets you associate gifts with an organization, as opposed to individuals.</li> <li>Lets you record gifts given "in honor of" or "in tribute to."</li> </ul>	<ul style="list-style-type: none"> <li>The system can create a full set of pledges based a payment schedule, which you can then customize as needed.</li> <li>When using the interface to add new gifts, the system asks if you want to apply them against existing pledges.</li> <li>Lets you easily map and import donor and gift information in custom file formats without additional charge.</li> <li>Lets you track the value of stock gifts without the use of custom fields.</li> </ul>

Donor Portal			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets donors check their account balance from a donor portal.</li> <li>Lets donors view their account statements and grant history from a donor portal.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets donors make deposits from a donor portal.</li> <li>Donors have the option to renew previously awarded grants from their giving history.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets donors select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria.</li> <li>Lets donors browse through a foundation provided list of “approved nonprofits.”</li> </ul>

## Relationship Management and Communications

Relationship Management			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you track at least three phone numbers and addresses for each contact, label them (for example, “office” and “cell phone”), mark the primary number and address, and track the persons’ preferred contact methods.</li> <li>Lets you keep a manual log of communications such as phone calls or personal meetings.</li> <li>Lets you mark that a particular person should not be contacted.</li> <li>Tracks organizations separately from individual grants to allow you to see a history of all grants to an organization.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you associate multiple contacts with an organization, and define their relationships to you and to a specific grant.</li> <li>Lets you keep former staffers that were associated with a grant on an organization’s record without making them active contacts for communications.</li> <li>Can track individual business units under a larger organization. OR, lets you automatically capture emails from external email systems into grantee or organization records.</li> <li>Lets you track people’s seasonal addresses with effective dates.</li> <li>Automatically stores a record of all system-generated letters and emails for each contact.</li> <li>Lets you track relationships between contacts and label them (for example, “family member,” “co-worker”) with custom relationship types.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you track as many phone numbers and addresses as you like.</li> <li>Lets you track people’s seasonal addresses with effective dates, and automatically switches primary addresses for the appropriate time-frame.</li> <li>Lets you define which addresses should be used for specific types of mailings without the use of custom fields.</li> <li>Can track individual business units under a larger organization.</li> <li>Lets you communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact).</li> <li>System allows you to automatically synchronize contacts with Outlook. OR, system allows you to automatically export system contacts to Outlook or Exchange. OR, system lets you automatically capture emails from external email systems into grantee or organization records.</li> </ul>

## Letters & Board Dockets

None / Not Acceptable	Basic	Solid	Advanced
<p>While letters and docket are quite different from a process perspective, they are technically very similar, and most systems have a similar level of support for each.</p>			
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you print a view of each grant application.</li> <li>Lets you insert mail-merge data into letters, possibly by way of downloading data into Microsoft Excel.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you define a default format for grant application summaries and choose which fields to include.</li> <li>Lets you print letters or summaries either individually or for a series of grants or grant applications in a single step.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you define a default format for printing grant application summaries, choosing which fields to include, as well as customizing fonts, colors, and logos.</li> <li>Lets you create letter templates that include mail-merged information about grants and organizations, and lets you customize their fonts, colors, and logos.</li> <li>Lets you view and customize individual letters before printing them.</li> <li>The system provides support for electronic signatures, possibly with external verification.</li> <li>Provides several standard letter and electronic templates that you can generate using grant record information.</li> </ul>

## Emails

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you send email through the system to a single individual, but not to a particular group of people at once. OR, Lets you easily send an email to a particular a group of people at once, but not to individuals.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you send email through the system to a single individual or a group of people who meet particular criteria.</li> <li>Lets you set up and send automatic emails based on certain events. OR, lets you set up and send scheduled reminders to applicants and grantees.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you create email to individuals and groups based on templates that include both standard text and “mail-merge” type inserted data.</li> <li>Lets you set up and send scheduled reminders to applicants and grantees</li> <li>Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.</li> <li>Lets you attach files to emails sent to individuals and groups.</li> </ul>

## Technical Considerations

System Querying and Reporting			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you run pre-packaged basic reports, such as a standard 990 report, upcoming payments, or the list of grants currently being reviewed.</li> <li>Lets you easily generate fund statements using pre-packaged templates.</li> <li>The system provides pre-packaged standard reports for common fundraising and donor management needs.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customized set of grants.</li> <li>Lets you save reports that you create or modify.</li> <li>Supports ad hoc reports, which can include nearly any field displayed to users, possibly by exporting data to Excel for formatting.</li> <li>Virtually all system data—including the data entered into online applications, review forms, and grantee progress reports, if supported—can be included in reports.</li> <li>Lets you quickly view favorite reports without navigating a much-larger set. OR, can make small updates to standard reports.</li> <li>There is a process of running reports that is easy enough for casual users to run queries independently.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Supports ad hoc reports within the system, which can include custom data columns, datasets, sorting, grouping, logos, and headers.</li> <li>Can make small updates to standard reports.</li> <li>Reports can be set to automatically run and sent to individuals or groups.</li> <li>Users can create their own multiple unique dashboards, or a vendor can do this for you.</li> <li>Lets you quickly view favorite reports, and possibly queries and actions, without navigating a much-larger set.</li> <li>Lets you save ad hoc reports that you create or modify.</li> <li>Lets you search the contents of file attachments.</li> <li>Lets you drill down for more information on some or all reports.</li> <li>Lets you create, view, and export data in a visual graphic representation such as charts and graphs.</li> </ul>
Permissions & Workflow			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you grant individuals access (or not) to certain large areas of system information, such as a module.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Has at least two different internal interfaces—for example, an admin view and a reviewer view—to provide a simpler experience for users with less complex needs.</li> <li>Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.</li> <li>Lets you grant individuals granular access to view, edit, or delete data for a wide variety of system functions.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you define user or group permissions on a field-by-field basis.</li> <li>Provides “dashboard” views, which summarize the grants and tasks currently relevant to each individual user.</li> <li>Lets you assign tasks, such as the review of a progress report, to particular users through workflow functionality.</li> <li>Provides a standard, focused, roles-based view for management and board members.</li> <li>Assigns tasks to users based on rules and roles.</li> </ul>

## Data Access

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>All data stored within the database can be extracted by someone other than the vendor. OR, the vendor agrees to provide data in a standard file format (such as .CSV) as part of the standard license agreement.</li> <li>Lets you export core grant data, such as project name, program, and grant amount, into another file format, such as .XLS or .CSV, in a way that it can be used for further reporting.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you export most data visible to users into another file format, such as .XLS or .CSV, in a way that it can be used for further reporting.</li> <li>Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system. OR, provides apps or views designed specifically for mobile devices (for any purpose).</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you export all data visible to users into another file format, such as .XLS or .CSV.</li> <li>Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system.</li> </ul>

## Overall Customization

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Lets you customize the information requested in online applications, if offered, potentially at additional cost.</li> <li>Lets you store custom information submitted by grantees, such as application narratives or progress report metrics, in separate fields.</li> <li>Lets you customize dropdown values for fields such as program or grant codes.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you customize the information requested in online applications and review forms at no additional cost. OR, vendor will extensively customize system to your needs, potentially at additional cost.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>Lets you add custom “internal tracking” fields for staff use, potentially at additional cost.</li> <li>Lets you add a virtually unlimited amount of custom fields, with an audit log to track their creation.</li> <li>Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).</li> </ul>

Ease of Use			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Most individuals could learn how to use the system with training.</li> </ul>	Meets <b>Basic</b> criteria, plus: <ul style="list-style-type: none"> <li>Users can easily find the actions they are most likely to take (possibly by looking through a considerable list of options).</li> <li>The interface is polished looking (though potentially otherwise flawed).</li> </ul>	Meets <b>Solid</b> criteria, plus: <ul style="list-style-type: none"> <li>The interface is polished looking and neatly laid out.</li> <li>Navigation and action items are labeled intuitively.</li> <li>Users can easily find the actions they are most likely to take.</li> <li>The system pulls together the information and actions an expert user is likely to need.</li> </ul>
Support & Training			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>Vendor can be reached for questions.</li> <li>Vendor provides either online or printed help manuals.</li> </ul>	Meets <b>Basic</b> criteria, plus: <ul style="list-style-type: none"> <li>Vendor provides training, potentially at additional cost.</li> <li>Vendor provides phone support.</li> </ul>	Meets <b>Solid</b> criteria, plus: <ul style="list-style-type: none"> <li>Vendor provides unlimited phone and email support within a yearly fee or maintenance package.</li> <li>Vendor provides initial training in person or via the internet at no additional cost, and additional training sessions can be scheduled.</li> </ul>
Customer Experience with Support			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding support was below .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding support was within .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding support was above .25 points of our average score.</li> </ul>
Customer Experience with Training			
None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding training was below .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding training was within .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding training was above .25 points of our average score.</li> </ul>

## Customer Experience with Implementation

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The vendor declined to distribute Idealware's survey and/or we did not receive enough responses to be statistically meaningful.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding implementation was below .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding implementation was within .25 points of our average score.</li> </ul>	<ul style="list-style-type: none"> <li>Number of respondents who agreed or strongly agreed with positive statements regarding implementation was above .25 points of our average score.</li> </ul>

## Stability in the Market

None / Not Acceptable	Basic	Solid	Advanced
<ul style="list-style-type: none"> <li>The system does not meet the criteria for <b>Basic</b>.</li> </ul>	<ul style="list-style-type: none"> <li>The software package has been in use by clients for more than one year. OR, the vendor reports that the software package has more than 10 clients.</li> </ul>	<p>Meets <b>Basic</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>The software package has been in use by clients for more than three years while supported by the same vendor. OR, the vendor reports that the software package has more than 20 clients.</li> <li>The revenue earned from the software package covers the personnel and operational expenses required to support it.</li> </ul>	<p>Meets <b>Solid</b> criteria, plus:</p> <ul style="list-style-type: none"> <li>The software package has been in use by clients for more than three years.</li> <li>The vendor reports that the software package has 50 clients or more.</li> </ul>

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# APPENDIX C: CUSTOMER EXPERIENCE SURVEY

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Grants Management for Community Foundations Consumer Experience Survey

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

Other (please specify)

\* 2. Would you recommend this system to another grantmaker?

3. About how long have you had the system you currently use?

4. Does your vendor offer multiple tiers of support (Basic, Premium, etc.)?

5. If so, did you elect to purchase the premium support level?

6. Do you agree or disagree with the following statements regarding *support* for the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I've never contacted this vendor	I don't recall
It's generally easy to reach someone with a particular problem or questions.	<input type="radio"/>	<input type="radio"/>				
In general, the people I've reached were able to solve my problem/answer my question.	<input type="radio"/>	<input type="radio"/>				
In general, my questions or issues are resolved within an hour or two.	<input type="radio"/>	<input type="radio"/>				
In general, my questions or issues are resolved within 24 hours.	<input type="radio"/>	<input type="radio"/>				
The vendor is consistently available and prompt in terms of responding to a question or other need.	<input type="radio"/>	<input type="radio"/>				
The vendor provides useful online avenues in which to research an issue or solution myself.	<input type="radio"/>	<input type="radio"/>				

7. Do you agree or disagree with the following statements regarding *updates* for the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I've never contacted this vendor	I don't recall
I generally hear from the vendor about pending updates to the system/	<input type="radio"/>	<input type="radio"/>				
In general, it is clear to me what is in an update.	<input type="radio"/>	<input type="radio"/>				
In general, updates to the system are relevant to our needs.	<input type="radio"/>	<input type="radio"/>				

8. Do you agree or disagree with the following statements regarding the *implementation* of the system you use?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in implementing the software
The implementation of the software went according to schedule.	<input type="radio"/>					
The implementation of the software went according to budget.	<input type="radio"/>					
The representatives of the vendor during the implementation phase were knowledgeable.	<input type="radio"/>					
The system delivers on the promises the vendor made during the sales process.	<input type="radio"/>					
Small issues from implementation were resolved within a few days.	<input type="radio"/>					
Larger issues from implementation were resolved within 1-2 weeks.	<input type="radio"/>					

9. Do you agree or disagree with the following statements regarding the *training offered by the vendor*?

	Strongly disagree	Disagree	Agree	Strongly agree	I don't recall	I was not involved in training on the software
The training offered by the vendor covers areas of interest to me and my organization.	<input type="radio"/>					
The training offered by the vendor is generally helpful.	<input type="radio"/>					
The training offered by the vendor is generally easy to understand.	<input type="radio"/>					
The training offered by the vendor is generally easily accessible.	<input type="radio"/>					
In general, the quality of training offered by the vendor is worth what we pay for it.	<input type="radio"/>					

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

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# APPENDIX D: ABOUT THIS REPORT

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## Authors

### **Kyle Andrei, Senior Researcher**

As Senior Researcher, Kyle is responsible for researching software through demos, interviews, and surveys, and using that information to create Idealware's reports and articles. In addition, Kyle also draws on his broadcast experience to produce Idealware's Ask Idealware videos. Outside of Idealware, Kyle volunteers with the Maine League of Young Voters as chair of the Civic Guide Committee, providing nonpartisan guides to the civic process in Portland. Kyle is a graduate of Indiana State University, where he studied broadcasting, managed the student radio station, and volunteered on local election campaigns.

### **Chris Bernard, Research and Editorial Director**

Chris is a career writer and journalist with two decades of experience in newspapers, magazines, advertising, corporate and nonprofit marketing and communications, and freelance writing. Prior to Idealware, he was managing editor of a newspaper and a senior copywriter at an ad agency. Since 2007 he has overseen Idealware's editorial and communications efforts, driving the creation and publication of more than a hundred articles, reports, and other resources and managing the communications calendar. Outside of his work at Idealware, he's an award-winning author and a frequent speaker and lecturer at literary conferences and festivals around the country.

## Contributors

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## About The Report Partners

### Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit [www.idealware.org](http://www.idealware.org) to learn more or view our hundreds of free articles, resources, and reports.

### PEAK Grantmaking

PEAK Grantmaking (formerly Grants Managers Network) is an association of 3,600 grants management professionals. The people of PEAK Grantmaking come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector. This is where Practice Meets Purpose. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we support grantmaking practices designed to maximize mission-driven efficiency and effectiveness of funders of every size. PEAK Grantmaking is a leader in identifying and promoting effective grantmaking practices through field-wide change efforts. Learn more at [www.peakgrantmaking.org](http://www.peakgrantmaking.org).

### Technology Affinity Group

The Technology Affinity Group (TAG) is a nonprofit membership organization that promotes the power of technology to advance the goals of the philanthropic sector. TAG is an active community of professionals responsible for aligning technology with the philanthropic objectives of their organizations, striving to provide the highest quality resources and learning opportunities for TAG members in an open environment built on trust and a shared belief in the greater common good.