A CONSUMERS GUIDE TO GRANTS MANAGEMENT SYSTEMS FOR PUBLIC AND PRIVATE FOUNDATIONS

JULY 2024

Grantbook PEAK GRANTMAKING TECHNOLOGY ASSOCIATION of GRANTMAKERS TECHIMPACT®

Dear Reader,

We are so proud to be bringing you the 2024 edition of *A Consumers Guide to Grants Management Systems for Public and Private Foundations*, which was formerly known as *A Consumers Guide to Grants Management Systems*. As the sponsors and stewards of this guide, we have combined our expertise and knowledge of the GMS landscape along with the movements and trends we see happening across the sector.

Earlier this year, grants management professionals took the time to complete a survey and provide their thoughts. Their invaluable input both reinforced and expanded upon the transition philanthropy is making from a transactional to a transformational field—not only in the people and principles it is embracing, but also in the technology it uses.

We want to acknowledge the tensions that have sprung from these trends, particularly pertaining to the roles and responsibilities that we now expect our grants management systems to fill. We require them to engage and participate in the larger ecosystem of philanthropy, balancing the day-to-day work of grants management professionals with the higher principles and practices we wish to see applied in that work. To this end, you will notice that our evaluation rubric also aims to address these tensions—we take time to both describe the practical functionality of each system as well as which practices and principles they enable.

A couple of the more prominent trends we incorporated into this edition of the guide include artificial intelligence (AI) and how to use it responsibly—which has been a huge topic of discussion for the world over the past few years—and equitable, trust-based practices, which also continue to gain momentum in our sector. Grantmakers are clamoring for GMS vendors to incorporate both of these considerations into their systems.

We know how deeply you care for your grantees, and how badly you need your technology, systems, and processes to support and enhance your ability to positively impact their lives. The goal of this resource has always been to empower grants management professionals to make the most informed choice they can when it comes to their tech solutions. We sincerely hope that the 2024 Consumers Guide can help you on your path to your next GMS.

Warmly,

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Introduction

Now more than ever, grants management systems play critical roles in foundations' technology ecosystems. While they were once primarily used by grants managers, they have since evolved in functionality and customizability to include applicant and grantee portals, program management functions, dashboards and reports configured to meet the needs of leadership teams, and even some board portal functionality.

That evolution doesn't happen in a vacuum—rather, it is the result of multiple intrinsic and extrinsic factors, a combination of individual foundation and grantee needs with the broader sector trends that become the headlines of so many articles, discussions, and conferences. This growth is certainly welcome in a sector that is often characterized as being stalled and stagnant, but it also brings new tensions, or growing pains.

If you've opened this guide and are in the market for a new GMS, chances are good that you are already intimately familiar with the challenges of managing your grantmaking operations. If you've been in the field for more than five years or so, you have also likely seen massive changes to your role, scope, and focus area. The role of grants management professionals has broadened and, in some ways, become less defined, which has in turn increased the rigor of requirements we place onto our technology.

Simply tracking financials and reporting is no longer enough for many grantmaking organizations. Ever-growing interest in trust-based and grantee-centric practices and reducing administrative burden continues to shift the landscape of grants management systems and tech, pushing the companies building those systems to incorporate more user-friendly processes, automated workflows, and third-party integrations to facilitate the exchange of information and data. While it is impressive to see the technological advancements in our sector, the wide range of solutions available to grantmaking and philanthropic organizations can be overwhelming.

This explosive growth dovetails with the rise of artificial intelligence (AI) and our appetite to integrate its powers and processes into pre-existing workflows. Of course, this trend isn't limited to philanthropy; use cases for both predictive and generative AI are popping up in sectors worldwide, with varying degrees of success.

One of the difficulties in achieving impact with AI is the lack of sector-wide infrastructure to supply and support it with good data. Many communities of practice are working more closely together to collaborate on common challenges to the benefit of the grantees they serve. But it is also important to keep in mind that we all have a role to play in making the systems that support philanthropy more effective and more equitable. In practice, that means continuously working to implement equitable and effective practices while advocating for systems and tools that support these efforts. PEAK Grantmaking has a collection of resources to help you address the complex challenges of working with data, recalibrate your grantmaking processes, and help you transform raw data into practical insights and share knowledge across the sector.

Foundations have power to effect change as funders, as facilitators, and as customers. Keep in mind that the technology you choose is a means to an end—it is not the end. Treat your tech as a way to be transformative, not as the transformation itself. While your system acts as a tool enabling you to participate in better practices, your role is to ensure those practices are tied to your organization's values. The people working in this sector are the heart and soul of all we achieve, and they carry the responsibility of embedding that drive and care into the tech that supports the work.

Changes Since the Last Report

As with previous editions, this guide continues to focus on platforms that serve private and public grantmaking foundations. If you are interested in software with features needed by community foundations, such as sophisticated fund management and donor management, we recommend our July 2022 publication, _Landscape of Integrated Software for Community Foundations._ If you have an interest in additional types of grantmaking systems, we invite you to share this with us by emailing marketing@techimpact.org.

This edition introduces substantial changes to how we evaluate and present the grants management systems based on feedback we've received over the past several years. To reflect the changing role of grants management systems in how foundations work, we once again developed a set of inclusion criteria that spell out "must have" features for software to be considered for the guide. Those criteria focus on cloud-based systems that have a demonstrated client base in the private and family foundation sector.

Once we chose the systems for review, we used a redeveloped ratings rubric that groups software functionality into eight areas and specifies whether and how each system meets our requirements criteria as follows:

1. The functionality is core to the system and available to all clients.
2. The functionality is available to premium-level subscribers.
3. The functionality can be purchased as an add-on to the base system.
4. The functionality can be achieved with a system workaround.
5. The functionality is available through a pre-existing integration with third-party software.
6. The functionality can be achieved through custom development.

Every system review includes graphs that summarize how the software meets the requirements from that area of the rubric as well as an in-depth narrative explaining its approach to the major features.

Changes in the marketplace continue to impact systems we included in previous reports. We identified three new grants management systems that met our inclusion criteria: **Impactfully by Foundation Source**, **Submit. com**, and **Temelio**. In addition:

• **First Akoya.net** was replaced by **akoyaGO**, a redeveloped grants management solution also built on Microsoft Dynamics, and is included in this edition of the guide.
• Bonterra acquired **Cybergrants**. We reached out to the vendor multiple times about participating in this edition of the report, but did not receive a response.
• Salesforce has announced that it is sunsetting **foundationConnect** in 2025 or 2026 and will focus on its grants management product, **Salesforce Grantmaking**, which we included in this edition of the guide.
• WizeHive released a new grants management platform called **NextZen**, which we are including in this report in place of **Zengine**, which the vendor will continue to support.

How to Use This Guide

We designed this report as a reference to help you determine which grants management solutions might best fit your needs. It is available in two formats: as a downloadable and printable PDF, and as a companion online edition with a tool that allows you to filter systems by feature and select systems to compare.

The guide itself is broken into several sections. "Selecting a Grants Management System" highlights the features and functionality you can expect to see in this type of software as well as considerations for selecting and implementing a new system or transitioning from one system to another.

"The State of the Grants Management System Marketplace" takes a deeper dive into the foundation and grantmaking trends that have shifted the marketplace over the last five years and how some software is evolving to meet these new demands.

"Comparing Grants Management Systems" takes a closer look at the specific systems we reviewed. Each has its own strengths and trade-offs, and there is wide variety among them. We grouped them into eight categories, or use cases, based on what we saw as primary differentiators. If you already know that your organization's needs match one of these use cases, this section can help you start defining a short list of solutions. For each, we've provided descriptions highlighting the pros and cons, particular audiences or applications, and pricing estimates to help you get an idea of how it fits into the overall marketplace.

We've also included a detailed comparison chart that provides an at-a-glance summary of how the systems in this report meet the functionality identified in our evaluation rubric. The online edition of this guide provides additional tools to help you narrow your search, allowing you to filter the comparison chart by the functionality most relevant to your needs.

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

It's worth noting that these criteria are not intended to be a list of what every system should be expected to provide. Different products approach the needs of foundations in different ways, and vendors have different philosophies about how to approach these needs. Some systems were developed for niches in the sector while others focus on specific strengths and are designed to be used in tandem with separate, third-party solutions. With any technology purchase, the solution you select is more than the sum of its functions. The provider of your platform is an important partner, too—selecting a vendor that aligns to your needs during implementation, adoption, maintenance, and ongoing enhancements is also an important consideration.

Final Thoughts

The impetus for the inaugural edition of the guide, published in 2008, was to address the growing complexity of grantmaking and need for more sophisticated systems. That continues to be our driving motivation as we proudly share this sixth edition. We have continued to work to identify the factors driving the evolution in the marketplace and to integrate the changing requirements into our evaluations.

It is no longer acceptable to do business as usual; we have to do better by our grantees, by our own teams, by our tech choices. To that end, it is imperative that we ask more of our GMS to enable us to do better. You'll notice that some of the evaluation factors in the rubric are not yet common practice, and that's OK—these provide a clear area for improvement where we can strive as a sector to do better. As the bench of experts charged with evaluating the current GMS landscape, we owe and own our due diligence to staying on top of emerging trends and tough questions. While our rubric creation was expertise-informed, the evaluation of each of these systems is neutral and based on feedback from their users.

The fifth edition of this guide was developed in consultation with a distinguished collective of subject matter experts who provided their generous insights not only into the changes in functionality in today's systems but into the systemic changes that are transforming grantmaking itself. This new edition builds on that, and is the result of extensive research, time, and effort dedicated by our valued partners and system vendors. We hope that it can help you gain a deeper understanding of the options available to you and ultimately make the right choice for your organization's needs.

The State of the Grants Management Marketplace

Grants management systems sit at the confluence of a variety of changes in the way the philanthropic world does business. In a world in which remote work has become the norm, data has become more accessible and more frequently used by non-technical people, and foundations are rethinking their relationships with grantees, the technology that facilitates and powers grantmaking has had to do more for a wider range of users.

Today, grants management systems are evolving into not just an important piece of a foundation's larger technology stack but increasingly a tool that is the center of the stack. The ways in which the different platforms achieve this centrality differ. Some vendors build as much functionality as possible into their core systems, while others choose to integrate them with other commonly-used tools.

The systems are no longer used solely by grant managers. Smaller foundations with fewer staff that generally lack in-house IT teams to manage a variety of systems are turning to all-in-one tools that let them manage grants and relationships with grantees, simplify the processes for sending payments over to their finance teams, and generate holistic reports of activities and outcomes. Larger foundations tend to take a more modular approach that connects different specialized enterprise solutions and build automations that help them more efficiently process high volumes of applications and grants.

Systems across the spectrum are rolling out new tools and features to meet changing demands in the marketplace.

Security
High-profile security breaches in systems that serve the nonprofit and philanthropic markets have increased the demand for more stringent security protections of data in grantmaking systems. Multi-factor authentication (MFA) is now standard and many systems either have or will have single sign-on (SSO) capability. When choosing a system, foundations are now looking more closely at vendor data and security policies to learn more about how their systems handle encryption, data storage, and access.

Data Integration and Sharing
The data held within grants management systems can be the key to effective grantmaking, but data quality, collection, management, and accessibility are all common barriers that foundations face. Foundation and nonprofit activities can generate large amounts of qualitative and quantitative data, but foundations need to be able to capture, categorize, standardize, and report on this data in order for it to be useable.

Several philanthropic data standardization and impact-reporting repositories have expanded in recent years:

- Candid has continued to build out its nonprofit demographic data collection and has developed integrations with a number of grants management systems to allow foundations to import and use this data to better understand their grantees and impact.
- The Impact Genome Registry provides standardized impact data from thousands of nonprofits to foundation, corporate, and government funders.
- Foundations around the world are using the 17 United Nations Sustainable Development Goals for outcomes and impact measurement.
- Standardization of data is important not just for collective measurement and reporting, but also to identify areas of systemic bias and to surface communities and programs that might otherwise be neglected. This includes gender-inclusive taxonomies and more in-depth demographic categorization.

Integration with standardized data repositories can also provide foundations with useful data that they might not otherwise be able to collect without greatly increasing application and reporting burdens on their grantees.

Reporting and Data Visualization

Reporting has continued to become more sophisticated, but also more accessible to non-technical users. Many grants management systems offer multiple dashboards across the system and allow you to configure dashboards for executive users and board members with access. Several systems have added or are adding the ability to schedule reports and even email the reports to external users.

A couple of systems have further stepped up their reporting game by adding integrations with business intelligence tools like Microsoft PowerBI and Domo. This is helpful to large foundations that work with large quantities of data and has also made more powerful and sophisticated dashboards and data visualizations available to data savvy medium and small foundations.

Enhanced reporting is becoming more important to foundations of all sizes, as many are looking to improve their data-driven decision-making and get a clearer picture of their impact. As part of the increased focus on social justice, foundations are also looking to gain a clearer picture of their grantees and grantmaking to uncover bias in their systems. Reporting that aggregates data across programs and collecting and reporting on demographic data have helped drive changes in the way some grantmakers are doing their work.

Equity-Centered, Values-Driven, and Trust-Based Grantmaking

One of these changes is the shift toward non-traditional methods of giving. This has resulted in the rise of equity-centered, values-driven, and trust-based grantmaking (for example, PEAK Grantmaking's five grantmaking principles).

These practices, principles, and movements arose to address power imbalances in the funder/grantee relationship that contribute to the entrenchment of systemic inequities in society. The result has been a re-examination of the way in which foundations engage with and fund organizations and projects. Rather than a top-down approach to programs and relationships, foundations that practice these methods instead look toward collaborative, equitable, values-based, and participatory grantmaking practices.

The relationships between funders and grantees are the cornerstone of these practices, which means that grants management systems that include a constituent relationship management (CRM) component or that integrate with a CRM are an important tool for these practices. Other systems looking to serve foundations exploring these practices are working to improve their relationship and interaction tracking functionality, simplify and automate their application processes to reduce the burden on nonprofits and/or find less-burdensome alternatives to traditional applications, and strengthen their budgeting functionality to support multi-year grantmaking.

Foundations practicing equity-centered, values-driven, and trust-based grantmaking also are looking to ease reporting burdens on their grantees while still capturing the data they need to evaluate impact. Grants management systems are helping them do this by facilitating oral reporting (e.g. recording a conversation with the grantee or allowing them to upload a video report and using AI to create a

transcript or summary of the report), surfacing application responses and other system data on reporting forms so grantees don't have to look for their applications or retype any information, and allowing foundation staff to submit reports on behalf of grantees.

Artificial Intelligence and Machine Learning
The rapid rise of user-facing generative AI and the increasing sophistication of machine learning tools are just beginning to have an impact on grants management technology, and grants management vendors are beginning to experiment with ways in which they can integrate AI functionality into their software.

While the potential benefits of AI-generated or enhanced processes are myriad (reducing administrative burden for both grants managers and grantees, simplifying and streamlining processes, enabling integration across multiple platforms and systems), keep in mind that AI doesn't generate results out of thin air—the quality of its output depends on good data practices and effective data collection.

Currently, the most common useb of AI in grants management systems is to create transcripts of meetings and calls and summaries of applications, grants, and reports. Some of the reviewed systems include tools for applicants that use AI to suggest responses to questions based on the applicant's previous applications, either in the system or from PDFs uploaded by the applicant. Other functionality being developed includes AI-generated data insights, natural language workflow creation, and the generation of text descriptions of images and videos.

Part of the slower adoption of AI in the grantmaking world is related to concerns about bias and the ethical use of these types of tools. Another set of fears is that AI will remove the human aspects of grantmaking. In focus groups, for example, one vendor heard concerns from nonprofit staff about whether funders will be using AI to scan applications

for keywords and from foundation staff about applicants using AI to generate application responses that don't reflect the actual organization.

In response to these various concerns, the Technology Association of Grantmakers (TAG) partnered with Project Evident to develop a *Responsible AI Adoption Framework* to help grantmakers think through how they want to use AI, its impact on their staff and grantees, and how to select and implement AI vendors and tools in ways that align with their core values. This includes making sure that any AI adoption efforts are people-centered and transparent, that data security and privacy are protected and maintained, and that all activities are undertaken with oversight and monitoring.

Selecting a Grants Management System

What Does a Grants Management System Do?
Whether you are thinking about switching to a new grants management system or this is your first foray into grants management software, it is important to have a solid understanding of what types of features are possible and which are common.

At a baseline, grants management systems allow you to create, accept, and review grant applications; store contact information for applicants and grantees; schedule and track grant payments; and collect and store follow up reports. Most do much more than that... but more is not always better. The right system for your organization is the one that best supports your needs, not necessarily the one that has the most features. Feature-rich solutions can also be needlessly complex and may present an unnecessarily high learning curve for your staff.

This section of the guide explores grants management system features. Use it to construct a list of the ones that might be useful to you, and then use that list to prioritize features of importance for your own organization.

The charts in the next section show how the grants management systems profiled in this report address these features, whether natively for all users, through add-ons or integrations, or through custom development. You can also use our online tool to filter and sort the list of systems in this report based on our rubric.

Grant and Application Management
The core of a grants management system is the grant record. How systems handle grant records and the nomenclature they use can vary widely, but all grant records contain basic information about the grantee as well as its purpose and amount. The way a system handles the grant application to grant record transformation can also differ. It can involve anything from a simple status change in which the application record becomes the grant record to the creation of an entirely new record with the application record linked or attached.

As a grant moves through the review and approval process, it undergoes due diligence checks. Many grants management systems give the ability to do tax-exempt organization status checks against a database such as Candid's GuideStar Charity Check or the IRS Master Business File, but some do not. Similarly, many systems will facilitate U.S. Treasury OFAC compliance checks. When considering systems, ask the vendors if theirs does this and if the checks are manually triggered or automated. Also ask whether the results of these status checks are stored on grant records, organization records, or both.

Because grant records don't necessarily contain a complete picture of your relationship with an organization over time, it is helpful to have a system that allows you to easily view related records. This includes organization records, previous grants and applications, interactions, and documents. Many grants include reporting, site visits, or other requirements. Most systems let you define those requirements and assign them to staff or grantees with a due date. Some require you to manually set up requirements for each individual grant while others let you set up default requirements that can be applied to all grants—and then, perhaps, customized on a per-grant basis.

Once these requirements are set up, you can track which requirements are upcoming and completed. You can often set up dashboard reports to monitor upcoming requirements and requirements that need action. Some systems allow you to set up automatic email reminders that alert staff members or grantees when requirement deadlines are approaching. Systems with grantee portals often allow grantees to track their requirements and deadlines and submit reports.

Grantee portals allow applicants and grantees to register and login to a separate website to fill out applications, check application status, find information about grants they were awarded (such as upcoming payments and due dates for required reports), and sometimes update their contact and organization information. These portals are also usually where grantees can submit progress reports. Instead of having a separate website as a grantee portal, some grants management systems provide applicants and grantees with permissioned access to the main system that limits what they can do and see. A couple of vendors have created portals for grantees that combine information from all the funders who use their systems rather than providing clients with separate grantee portals; this allows applicants to log in and see all proposals in progress with these funders rather than having to register multiple accounts.

Nearly all systems allow grantees to register themselves and set a username and password. While some systems notify administrators of accounts with duplicate email addresses to determine if they need to be merged, other systems check for duplicate emails at the time of registration and prompt the user if an email is already found in the system. A few systems allow grantees to add other users from their organization as well. Many grants management systems now integrate with third party data sources to further streamline the registration and application process, while others have created their own databases of nonprofit organizations that new users can use to set up their profile. Several systems provide the ability for applicants to create an account and automatically populate applications with data from their organization's GuideStar profile just by entering the organization's EIN.

It's important to consider the experience of filling out application forms from the perspective of the grantseeker. Grants management software varies widely in the ability to support user-friendly and streamlined online application processes. Features that minimize the amount of information an applicant has to enter—either through auto-population from data that already exists in the system or via third-party integrations—help make it easier and faster to apply for grants. Some systems even allow applicants to duplicate prior applications or let funders clone previous grants.

Most systems support eligibility quizzes and at least a two-stage process that supports both an initial Letter of Intent and a more detailed proposal. While eligibility quizzes used to only lead to one application, more systems have added the ability for eligibility quizzes to branch to multiple applications based on applicant responses. 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.

Online applications collect information from prospective grantees in online data fields like text boxes, dropdown boxes, and checkboxes. Most systems support branching capabilities in online forms to collect different information from applicants based on the information they provide. Nearly all systems let grantees upload files, but some limit the number of uploads per application or impose size limits on uploads—this makes it difficult for applicants to upload audio or video files. Several vendors have developed complex budget forms that include calculations and feed into expense reimbursement forms and project reporting. Many support submissions from other sources—references, for example—that are kept invisible to the applicants.

Most systems let you customize forms with your organization's logo, colors, and fonts to match the rest of your website—if this is important to you, check to see if the systems you're reviewing support this feature. Most also support applications with multiple pages and sections, and a few also let you customize in-application help for grantees, either through

hover-over text, FAQs, or more innovative means such as videos.

Some systems automatically save online form entries at regular intervals to avoid the frustration of data loss from computer crashes or "timeouts." Others save data that has been entered as applicants navigate between pages or table; a few require applicants to click a button to manually save their work.

Many applicants want to download applications ahead of time to plan their responses or get input from others at their organization. Most systems allow these downloads, but the level of automation required to make the application available varies; some will create a download file of questions or a blank form automatically, while a few require you to create a PDF of the application yourself and upload it to the system when complete. A couple of vendors have developed the ability to create a fillable PDF or Excel template for an application that an applicant can download, complete offline, and then upload to the system. Nearly all systems allow applicants to download their completed applications, including attachments.

Collaboration features are becoming more common in grants management systems. Many systems let prospective grantees collaborate with other individuals in their organization to work on a single application—for example, to allow a financial staff member to enter budget information. An increasing number of systems allow two separate organizations to collaborate on a partnership application by letting one organization invite a person from the partnering organization to work on the submission. Numerous systems include the ability for funders to collaborate with applicants on applications in progress and provide comments and feedback before the applications are even submitted.

One helpful feature for monitoring the burden your applications place on applicants is the ability for the system to track the amount of time applicants spend completing applications. This is not a common feature as of yet, but a few systems do provide start and completion dates and times for applications, which you can use to calculate this data.

Once you've received grant applications, a grants management system should help manage the process of reviewing them and deciding what to fund. Many systems allow reviewers to see and rate applications online. This allows internal staff to review applications from any location and provides an opportunity for you to involve people from outside your organization as reviewers. Some systems provide reviewer portals that give reviewers simplified access to the content they need without requiring them to navigate the full grants management interface.

If you do plan to include external reviewers, consider features that allow you to manage this process in detail. Can reviewers choose which proposal to review and easily see and print both the proposals and any attachments? Can the system auto-assign applications to reviewers based on subject and reviewer workloads? Can reviewers flag conflicts of interest—for example, if they work for the same university as a grant applicant? Are foundation staff notified when reviews are completed, either via email or within the system?

Make sure it's easy for application reviewers to view all the information necessary to consider an application. For example, does the system let them see whether you've previously awarded any grants to the applicant? Can you restrict certain application fields so reviewers don't have access to them? Can they download the full application and attachments so they can review it offline? Can you easily print a summary for board members or executives, or only a document with every field and attachment in the proposal?

Software packages provide varying degrees of support for more complex review processes.

For example, will the system let you aggregate comments and scores from multiple reviewers? Can you define complex scoring criteria, such as multiple scores grouped into categories? Can scoring criteria vary between different grant programs or do you have to apply the same standards to all applications? 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.

All of the systems in this report include the ability for grantees to submit progress reports after grants are awarded. Online forms are usually used to collect progress reports—including narrative information, quantitative metrics, or even detailed budget information—that often can be mapped to fields in the system and used for outcomes reporting. However, the ease of setting these forms up can vary. In response to equity-centered, values-driven, and trust-based grantmaking trends, a few systems reduce the reporting burden on grantees by facilitating oral reports, allowing grantees to submit reports shared with other funders, or by allowing foundation staff to submit reports on behalf of grantees.

Relationships and Constituent Management
Relationships are at the core of grantmaking, and the ability to track them is of great importance for funders seeking to implement equity-centered, values-driven, and trust-based grantmaking practices. While grant records are a key component of grants management systems, most systems also support organization and individual contact records, and several offer some form of constituent relationship management (CRM) functionality.

Organization records and individual records provide holistic views of your organization's relationships. They allow you to see application and grant histories as well as their relationships with other organizations and individuals in your system. This holistic view of the data can allow

you to do things like see what conversations you had about a previous grant when a new one is under review.

Organization records can also give you visibility into demographic information that can inform your diversity, equity, and inclusion (DEI) efforts. Many systems can collect and store demographic data for organizations, projects, and programs on organization records. An increasing number allow you to access demographic information from an organization's GuideStar profile with a Demographics via Candid integration. However, some systems only link out to the data on the Candid site or pull in a PDF report; others allow you to import the data into your system for use in reporting.

Tracking different types of relationships is a valuable function. Grantmakers sometimes give grants to units of larger organizations—for example, they may award money to the school of education within a university. Some grants management systems allow you to track these grants by business unit as well as by the organization in which it lives. 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. It is also helpful to be able to track individuals affiliated with an organization but not on staff, such as board members or grant writers.

During the course of a grant, grantees are likely to interact regularly with various people at your organization. Grants management systems can help track these interactions by automatically logging system-generated letters and emails and allowing you to enter records of phone calls and communications sent outside the system. This is particularly important for ensuring cross-department communication and collaboration and also coverage if an employee is out of the office or leaves the foundation.

Some systems will only track this on grant records, while others allow you to associate interactions with organization and individual records as well. Are interactions searchable or can they be filtered by type or time frame? Do they appear as a list or along a timeline?

Even if a grants management system provides staff with the ability to email grantees through the system, it is unlikely that most staff will do so for routine communications. In addition to logging emails sent within the grants management system, it can be useful to capture into the system emails sent to grantees from external systems—for example, through Outlook or Gmail. The ease of capturing external emails varies widely. Some systems have plug-ins or integrations that work with email software, some require you to add a system email address to the BCC field of emails sent from external systems, while others require you to upload the email as an attachment or cut and paste it into a comment or notes field.

Grants management processes can be document heavy. Grantmakers often need to create not only printed letters and grant agreements but also board dockets that allow board members to review all proposals under consideration. Nearly all systems 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. Some systems have integrations with DocuSign to allow you to collect electronic signatures on system-generated documents.

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 can be helpful and many systems allow you to create

templates that include mail-merged fields (such as the project name) or file attachments (such as grant agreements).

Email delivery reports can be useful for grantmakers who intend to send bulk email from their grants management systems. While a few systems let you send bulk emails natively, most do so through integrations with marketing tools like MailChimp and Constant Contact. A few solutions in this report offer email delivery reports—including open, clickthrough, and unsubscribe rates—but most do not. If your organization plans to send bulk email through its grants management system, you'll also want to consider how bulk email will be sent.

Because much of the data that is used in board meetings often comes from the GMS, some vendors have created simple board portal functionality that allows you to share system reports and documents with board members.

Financial Management
Once your foundation approves a grant, you will need to manage the payment process. In many grants management tools, 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 let you set one or more default payment schedules 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. 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, confirm that the grants management system lets you link payments to requirements and won't

send a payment to be processed unless those requirements are met.

Systems vary in their support for payment special cases. Check whether it's straightforward to award grants to one organization but to pay another—a fiscal sponsor, for example—or whether you're able to update a grant amount in the middle of a grant period to account for unforeseen events without losing the record of the approved grant amount.

payments. Whichever payment method you use, make sure you can store such payment information 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? Can you run a report on scheduled payments to see what funds have been committed? Some systems allow you to update payment status in batch, either by selecting a group of records and performing a bulk action or by uploading a file to the system.

Grants management systems transfer payment data to finance teams in a variety of ways. The simplest method is for a grants manager to generate a report of approved payments to send to accounting. This can be automated by scheduling the report to run automatically and be sent to the appropriate person at preset intervals. Other systems use file transfer protocol (FTP) sites to exchange payment files with finance; you can also use a system's application programming interface (API) to pull data directly from the system into your accounting software. In addition, many grants management systems integrate with external accounting systems to streamline the payment process by transferring information about upcoming payments into the accounting system and then retrieving data on payments that have been made—vendors of packages without accounting system integration are

often willing to custom build this facility for an additional cost.

Finally, most grantmakers will want to control access to sensitive financial data and the ability to edit or update payment information. Most of the systems in this guide let you restrict editing access to payment information through permissions and according to payment status. There is wide variance among grants management systems in budgeting capability for grant funds. A few offer minimal budget support, while others allow budgeting only through heavy customization. Some packages, however, include strong budgeting components. Most commonly, budgeting features let you define the amount of money you plan to devote to each grant program or category and then generate reports to compare these budget amounts to the amount spent. More versatile systems allow you to track by both program and subprogram, or split grants between programs.

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.

For foundations that are looking for additional financial management functionality, a couple systems profiled in this report have more advanced capabilities, including forecasting and the ability to track interest payments on program-related investments.

Automation and Integration
The grants management process often is a series of tasks that need to be done by specific people and in a particular order. Because of this, many foundations want a system that manages the workflow—for example, assigning grants or tasks to individuals or roles and providing a customized view that spells those

tasks out for each staff member.

Out-of-the-box functionality in some systems may be sufficient for funders with more straightforward workflows, while those with more complex workflows may find that systems that support configurable workflows can simplify their grants management processes. Foundations with processes that vary among different programs will want to look for systems that give them the ability to define multiple custom workflows.

Automation is about more than just workflows. Automated emails remove the burden of repetitive communications, such as reminders and confirmations, from staff. 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 to alert them 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.

Grantmakers sometimes need to make similar updates to data across several grant records. Some grants management systems facilitate batch changes to data, while others leave you to make such updates on a record-by-record basis. Ask the vendor whether you can upload files to the system in order to make batch changes, like updating payment records. As vendors continue to build out artificial intelligence functionality in their systems, we will see even more automation of tasks that were formerly done by staff—for example, creating grant summaries and meeting transcripts.

The use of third-party tools can greatly expand the functionality of many grants management systems. Vendors offer a wide variety of pre-built integration, including connections to Candid's GuideStar Charity Check, Candid's GuideStar Nonprofit Profiles, and the IRS

Business Master File; Demographics via Candid; email tools like Microsoft Outlook and Gmail; and word processing software like Microsoft Word and Google Docs. There are also integrations to marketing platforms like MailChimp and Constant Contact; accounting software like Quickbooks and Sage Intacct; and business intelligence tools like Microsoft PowerBI and Tableau.

Vendors will often develop custom integrations with other software platforms for an additional cost. Many offer some form of API (open or private) so you can build your own data connectors between programs; if this is of interest, ask whether the APIs are read-only or if they let you write to the database so that you know whether you are able to create two-way integrations. A few systems also offer integration platform as a service (iPaaS) connectors—essentially, cloud-based middleware—to systems like Workato and Zapier.

Business Intelligence and Reporting
A grants management platform that offers an easy universal search not only gets you to the records you need faster, but it can also help less-technical staff find things in the system. Ask whether this universal search will also index and search the content of readable attachments uploaded to the system—will it return "fuzzy," or non-exact, matches?

Many systems provide tables that display all the records within each module of the system. The columns on these tables can often be customized to show the fields that are most important to a user and the data within the tables can be sorted and filtered to find subsets of records based on key criteria. These records can often be exported or updated with bulk actions.

Nearly every system provides some form of dashboard functionality, and most offer multiple dashboards across different modules. Some dashboards are role-specific. Many

systems let users create and/or customize dashboards in the system. Dashboards provide a mix of tabular data, system snapshots, and charts and visualizations—the complexity and sophistication of dashboards in systems varies greatly, from simple bar charts and line graphs to BI-powered visualizations that combine different sources of data. It can be helpful to be able to click on charts on a dashboard and drill down to the underlying records that make up the data.

System reports can help manage grants processes and provide updates to others. At a minimum, you should be able to create the basic reports you need to monitor your workflow, evaluate your practices, and report on your activities—for example, the amount of money committed and paid for the year, sorted by program, or grant details required for an IRS Form 990 or Form 990-PF. 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 is helpful, but not all systems allow this. Many systems that do provide standard reports and queries provide a lot of them—make sure you can mark preferred reports as favorites so they appear at the top of the list to prevent having to search through them all every time you need them.

Support for 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. 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, grouping, formatting, and calculations. It's also helpful to be able to export those reports in a variety of formats, including Excel, Word, and PDF. Many systems

now offer the ability to automatically run reports and send them out at intervals you define, either to you or to specified individuals, as well as to present information in visual forms like charts, graphs, and maps or export it to BI or data visualization tools.

Look carefully at the ease of use to judge whether someone on your staff will be able to effectively create reports. Also, make sure you can save a report format once you've invested time in creating it.

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

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

Because of the variety of ways systems approach outcomes, it's important to think carefully about what your foundation wants to measure and the particular strategy you want to or currently use. If you want to simply measure grantee progress against a few stated objectives for your programs—for example, if a particular percentage of populations served must be veterans or children—most systems will likely meet your needs. However, if you hope to compare your grantees' results against

national benchmarks or want to measure the total effect of a grant on a population against what changes would have happened without intervention, you will likely need software with more robust impact reporting capability.

Technical Considerations

All of the systems we reviewed have some level of "responsive" web design, which automatically rearranges fields, forms, and sections of the user interface to match the size of each user's screen. While this provides a convenient means of viewing grant records from a smartphone or tablet, it may not provide the ideal environment for filling out forms or answering questions with radio buttons or checkboxes. As a result, if you want your applicants to be able to use mobile devices to apply for grants, reviewers to rate grant applications from mobile devices, and staff to use the system in the field or onsite with grantees, look for systems that can provide an app or dedicated mobile interface for those use cases.

Not only is it a best practice to ensure that the grants management system you select is fully accessible to users with disabilities, but it's also important to fully understand where you might be putting up barriers to applicants, grantees, and staff tasked with using the system. This includes whether the software is compatible with screen readers for users with visual impairment, whether text and background is rendered in contrasting colors for individuals with color blindness, and whether users can navigate the software without using a mouse. While there are varying levels of website accessibility, start by asking vendors if their software conforms to WCAG 2.1 standards—you might be surprised to learn that most are not fully compliant. Software vendor Good Grants provides a helpful guide to creating accessible applications that includes questions you can ask vendors about accessibility.

Grants management systems differ greatly in the way they handle taxonomies for categorization. A couple of the systems we looked at have built-in taxonomies developed specifically for philanthropy that you may be able to expand, such as the Philanthropy Classification System from Candid and the U.N. Sustainable Development Goals. Most systems let you upload your own taxonomy, usually during the implementation of the system, and maintain it over time. Ask if the system allows hierarchical or "parent-child" taxonomies, which allows you to categorize and track programs across multiple levels. Does it allow dynamic or predictive tagging that makes suggestions from the taxonomy as the user types? In addition to controlled vocabularies, does the system offer user-generated content tagging?

Funders who provide grants in different countries may need a system that can accommodate the ability to make grants in multiple currencies. Some systems only let you set a base currency that is used for all transactions, while others let you make grants in multiple currencies but only record the currency and grant amount. A few systems have integrations with global exchange rate repositories and will track the exchange rate not just at the time of grant approval but also at the time of payment.

A few systems now provide some level of multilingual support for applicant portals and even for the back end of the grantmaking system. This ranges from changing the text on buttons and system text when the user selects the language of preference to having multiple language versions of the portal content, or even integrating with online translation services such as Google Translate. Some of the systems that achieve translation with multiple language versions require you to upload the content in all the desired languages, but a few help make this process faster by allowing you to generate AI translations of the content that you can provide to in-house language experts for review and fine tuning.

No matter the system, 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 essential in order to back it up beyond the regular backups provided by the vendor—always a good idea—or to migrate it to a new grants management system. 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 let you 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—for example, to manually load information from an external accounting system—is also helpful.

Security and Privacy Considerations

System security begins with login security. Every system profiled in this report provides some form of multi-factor authentication (MFA), using either SMS codes or authentication apps. A few have also developed single sign-on capability to make logins simpler while retaining high-level security.

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

Many vendors are willing to provide a link to their security and privacy policies to potential customers. These policies provide more detailed information on security practices, like whether data is encrypted at rest and/or in transit, any certifications or reports the vendor has obtained (such as SOC reports), where and how data is stored and who has access to it, how often the vendor performs backups and conducts penetration testing on its system, and actions the vendor will take in the event of a data breach or for disaster recovery. Privacy policies outline how the vendor handles data privacy in the system and, in conjunction with your own data policies, are important for compliance with Europe's GDPR, California's CCPA, and other privacy regulations like HIPAA.

User Experience

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

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

Training and Support

Whatever else you need in a grants management system, count on needing customer support. All the systems profiled in this report provide some form of technical support, system documentation, and at least informal training upon request. Technical support is usually provided either by phone, live chat, online ticketing systems, or through email requests. In addition, all vendors provide some form of knowledgebase that users can turn to for self-service support. Whatever form of support the vendor provides, it is helpful to ask what hours live support is available and what the typical resolution time is for support requests. You should also ask whether support requests are monitored after-hours and over the weekend for emergencies and catastrophic issues.

Good documentation, whether printed or online, is also important. Ideally, information is available in the form of tool tips or hypertext within the system—for example, to let you see what clicking a button will do before you actually click it. Some systems also provide in-system help text and topics customized to the page you are on, or allow you to customize the help text in the system yourself. 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 over-the-phone and online options to more formal training at your own offices—usually available for additional cost. Ask vendors whether they have training materials and how much you will pay. Some form of training is usually included with system implementation, and vendors often provide a library of training videos accessible through their knowledgebase or as part of an online training "academy."

Finally, many vendors offer online user forums and communities—although some are more active than others—as well as yearly training conferences and user meet-ups.

Customer Experience: No System is Perfect

As part of the research for this guide, Tech Impact and our partners distributed a customer experience survey to our mailing lists. We also asked participating software vendors to share the survey with their clients, and in all, we received 268 responses. We've included the aggregate scores for each vendor in three areas—implementation, training, and support—in their profiles. In the survey, we also asked respondents to describe any reservations they had about the systems they use. Their responses overlapped in certain areas—here are a few things to keep in mind when selecting a system.

Expectation vs. Reality

Vendors like to put their best feet forward when demoing systems. When clients dig in, however, they sometimes find that while the software may technically do all the things the vendor said it could, the actual functionality leaves a lot to be desired. Survey

respondents talked about systems that don't deliver on what the sales teams promised and "Frankensteined" systems whose modules were developed separately and don't work well with one another. Some functionality is only possible with workarounds or manual processes, and some functionality can be achieved only if someone on staff has deep technical knowledge or if the foundation engaged a consultant with deep product knowledge to help make the system work. Some vendors rush system updates and improvements through the development process in order to meet demands for new features; the resulting functionality can be buggy and unreliable.

Our Takeaway: Ask vendors to demonstrate exactly how everything works during demos, especially if it is essential functionality for the way you do work.

Communication is Key

Vendors that listen to customers and communicate frequently and transparently about their systems, product updates, and turnaround times earn more customer goodwill than those who don't. This is compounded by high staff turnover rates at some vendors that leave customers unsure of who to contact for help.

We heard about customers submitting product upgrade ideas to a vendor only to have them languish in an idea portal, lack of communication around what is included in product updates, spotty documentation, and tech support requests going unanswered for several days. We also heard reports about tech support tickets that never get resolved, with no vendor communication about progress to put the customer at ease.

Our Takeaway: Talk to people who use the system and not just references provided by the vendor; ask your peers about the vendor and post your questions in online industry communities, like CONNECT, PEAK Grantmaking's online discussion space.

Customization and Configuration are Great…to a Point

Many vendors boast of their systems' flexibility and ability to conform to your processes, but this can come with financial and human costs. Survey respondents reported that having numerous customizations makes their systems overwhelming for some to use, and that extensive configurations and customizations have resulted in extra costs during implementation or for post-implementation support. The difficulty here is finding the balance between the value of the customizations and the price you pay for them.

Our Takeaway: Work with your vendor to determine what configuration changes you really need or where it might make more sense to rethink your processes.

What do These Systems Cost?

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

- **Yearly Fees:** Most systems charge an annual fee that is often scaled to usage. It's likely to be based on some combination of the total number of system users, how many grants applications you accept, how many documents you store, and how many programs with separate system processes you run. A few systems define this yearly fee based on the amount of assets you are administrating within the system rather than your actual system use.

- **Add-Ons:** Many systems offer an à la carte menu of optional modules that can substantially affect the license cost.

- **Setup and Configuration Costs:** Most vendors charge setup and configuration fees for your initial system implementation. Some vendors' pricing structures are simple, charging specific fees for analyzing and documenting your system requirements, customization, online application building, report creation, and data migration.

- **Maintenance and Support Packages:** While most implementations include some level of introductory training for staff and basic support, some systems also add on an annual "maintenance" fee to cover enhanced support.

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

Whether you pay the vendor, hire a consultant, or choose to tackle setup or installation yourself, there's often a lot of work to do. Data migration in particular is a time-consuming and often underestimated task. The comparison charts in the next section include vendor-provided price estimates for yearly subscription fees for each system, roughly broken down into small, medium, and large foundations. Individual system profiles also provide details about vendor pricing models for yearly subscription fees as well as some information about how implementation costs are calculated by each vendor.

Are you planning to switch to a new grants management system ?

- Yes
- No
- Not Sure
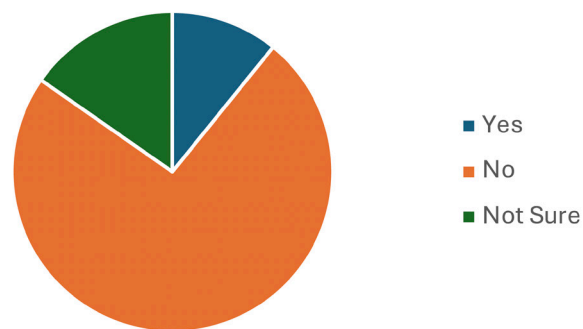
Source: Tech Impact 2024 Grants Management System Customer Experience Survey

If you've been using a grants management system for a while and it is making you want to tear your hair out, you might be tempted to look for a new system. Moving from one platform to another is neither an easy task nor an inexpensive proposition. It takes months to configure a new system and to migrate your data from the old system to the new one.

The first step is to figure out why your current system is causing you frustrations and ask your current vendor if they can make any fixes or adjustments so it works better for you. If the problems are too big, however, or the system can no longer meet your needs, it's time to consider a new one.

With so many vendors in the marketplace, it can be daunting to figure out how to start looking for a grants management system. One thing to keep in mind, however, is that you're not looking for the best system. There is no single best system. Instead, you're looking for the best system *for your foundation*.

The first step is to look at how you do your work. How do you solicit applications? What are your review processes? How do you handle grant payments? What are your reporting requirements? Who needs to be informed about your work, and what kind of information are they looking for? This can be an excellent time to think about how to improve your processes to become more efficient and effective and to incorporate principles of values-driven grantmaking and trust-based philanthropy into your giving.

There are numerous steps you can take to reduce burdens on your applicants and grantees. Sit down for conversations with staff across the foundation to learn more about your processes. What are some of their frustrations or pain points? What is your foundation doing well? You should also talk with your grantees about their experience with applications and reporting to find out where in your processes they are experiencing difficulties and whether

they work with other funders that have simpler systems. Finally, it helps to evaluate the technical abilities of staff who will be using the grants management system to identify how comfortable they are working with databases and whether they may need a more "high touch" customer support solution.

At this point, you may consider bringing in outside consultants to help pull together a list of requirements and manage the system selection process. They can help you identify your business needs and suggest several systems that might meet them as a starting place. A software selection consultant is especially a good idea if your foundation does not have in-house expertise or experience evaluating and selecting technology vendors.

From the conversations with your colleagues—and consultant, if you decide to work with one—you should be able to come up with a list of functionality that you can then prioritize into "must haves" and "want to haves." Use these to narrow down your search with the help of the next section of this guide, in which we've categorized systems by certain differentiating characteristics—for example, which are easiest to use out-of-the-box, which have stronger reporting capabilities, and which are suited to international grantmakers. The online version of this report includes a detailed comparison chart you can sort and filter by system function. At this stage, your goal should be to identify three to five systems you'd like to explore further.

Read their full profiles in this report to see whether they may be a fit and help you narrow down the list to your top three prospects. At that stage, you can contact the vendors to talk through your needs and set up system demos. Provide them with your requirements, along with background information on your current system, processes, and challenges, and give them a list of features you want to see demonstrated.

Most system demos will be led by members of the sales team. They'll want to show you all the ways the software can do exactly what you need it to. It's important to look deeper and ask specific questions about how it can meet your needs. If the vendor says the software can do something, ask them to demonstrate it for you. It is very helpful to have a cross-section of the staff participate in the demo to get different perspectives on whether the system fits your processes and whether it is user friendly for everyone.

Ask about pricing and which features or services will have additional costs. It is also important to have someone who understands your security and data needs talk to the vendor about their security and privacy practices to make sure that the system will allow you to comply with any and all regulations to which you are subject. If there is functionality that is non-negotiable—for example, required by your fiscal/audit policies or compliance with government or industry regulations such as GDPR or HIPAA—make sure you receive assurance in writing that the system has the necessary certifications or functions.

One thing to keep in mind is that your processes will likely not map directly to how a grants management system works—especially when you are working with a tight budget. While many systems are both flexible and highly configurable, this flexibility can also translate to additional costs. In order to find a system that meets your needs and your budget, you may have to adjust some of your workflows or practices.

You should also talk to the vendors about their priorities and culture. As foundations, you work to make this world a better place, and it is important to work with vendors who support and model the values that you hold. Finding vendors who are committed to ethical and human-centered development practices is one more way to deliver on your mission.

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

Once you've made a decision and signed a contract, consider whether you have clarity on what you want to achieve with the new system and the in-house expertise to implement it successfully. Migrating to a new system is an opportunity to make changes to your forms and processes that will allow you to work more efficiently and effectively, but you need to plan all of this out before moving forward with implementation.

This lets you focus implementation on how to make those changes and not on what changes to make. An implementation consultant experienced with your chosen system can help you ensure a smooth implementation and improve user adoption. Experienced consultants can help you avoid miscommunications and common pitfalls that can cause extra work or a delay in launch.

Comparing Grants Management Systems

All grants management systems evaluated in this guide share a great deal of functionality in how they address common requirements. In this section, we look at the areas of differentiation among the systems to help you determine what systems might fit your own foundation's needs more suitably.

We've sorted the systems into eight categories:

- Low-Cost Systems
- Systems with Out-of-the-Box Functionality
- Highly Configurable Systems
- Systems with Advanced CRM Features
- Systems that Assist Non-Technical Users
- Systems with Business Intelligence Tools
- Systems for Global Grantmakers
- Systems that Facilitate Equity-Centered, Values-Driven, and Trust-Based Grantmaking

Low-Cost Systems
Small or budget-constrained foundations with simple grantmaking processes don't need to pay tens of thousands of dollars for an effective grants management system. While not all participating vendors provided sample pricing for their systems, four have packages available for less than $5,000 a year:

- **Blackbaud Grantmaking:** Offers a Basic package with pricing that starts at $4,995 per year. Designed to meet the needs of smaller organizations without complex workflows, the Basic package does not include a reviewer portal, budget module, accounts payable functionality, or the ability to create custom integrations. It does include a set number of implementation hours, and clients can add on extra services if they want to expand the scope of implementation.
- **Foundant Grant Lifecycle Manager:** Available starting at $4,250 per year, with

a two-year contract required. The Basic license does not include eligibility quizzes or advanced automation, and limits file sizes. Implementation is priced separately from the yearly license fee, but includes training and support from an assigned customer delivery team member.
- **Salesforce Grantmaking:** Licensing costs are on a per-user basis and include the platform's Nonprofit Cloud offering. The Enterprise Edition license starts at $175 per user, per month, billed as $2,100 annually. However, implementation costs vary widely and are not included.

In addition, the following other systems profiled in this report offer license options under $10,000:
- **akoyaGO** pricing starts at $7,500 per year.
- **SmartSimple** starts at $6,000 per year.
- **Submit.com** starts at $5,995 per year.
- **NextZen** starts at $7,500 per year.
- **GivingData** starts at $9,950 per year.
- **Amp Impact** offers pricing starting at $5,000 per year based on portfolio size, but also requires Salesforce licenses.

Systems with Out-of-the-Box Functionality
Smaller foundations and funders without dedicated IT teams to manage systems may be looking for a grants management system that does not need a lot of configuration or customization for them to get started. The following systems all make good out-of-the-box options:

- **Blackbaud Grantmaking:** The low-priced Basic system implementation is available for small foundations looking for out-of-the-box capabilities. The system comes with 250 standard reports and is designed to meet the needs of smaller organizations without complex workflows.

- **Foundant Grants Lifecycle Manager:** The system includes a predetermined grant workflow with stages that can be turned on and off. Designed for foundations with

a one or two stage application process and a simple evaluation process, the system governs user access with six preset roles.

- **Fluxx Grantmaker:** New clients who select the Quick Start implementation package receive a best practice-based workflow suitable for a wide range of uses. Customers that grow or that become more comfortable with the software over time can also set up custom workflows within the system without having to upgrade or pay additional costs.
- **Impactfully by Foundation Source:** Workflows in the system are focused on the application and review process. Submitted applications have a status of "under review", while other preset system statuses include "voting required," "voting complete," "enter grant," and "decline application." The system also includes 38 prepackaged reports that can be edited and saved as custom reports.

Highly Configurable Systems

Funders with very complex workflows and processes often find that they don't fit into the confines of many out-of-the-box solutions or platforms built for small-to-medium sized foundations. Systems that allow for a large amount of configuration and customization may be a better fit in these circumstances. However, high levels of configuration can result in significantly longer implementation times and a greater need for in-house (or consultant) expertise to optimize and maintain. The following systems can be considered highly configurable:

- **Fluxx Grantmaker:** Depending on the implementation package selected, the vendor will work with new clients during onboarding to build out a series of workflows based on the their grantmaking processes. The system allows for multiple workflows, and workflows can include conditional logic.
- **Salesforce Grantmaking:** As the first grantmaking solution built directly into the core Salesforce platform, Salesforce Grantmaking adds grants management

objects and components to extend the functionality of your existing Salesforce license. The software includes access to several different automation tools to set up workflows ranging from simple to complex. You can also add on different functionality, like Salesforce's Outcome Management features or Einstein AI solution.

- **SmartSimple Cloud:** As a business process automation tool with grants management capabilities, SmartSimple Cloud uses a series of interconnected modules to provide custom configuration for every client.

Systems with Advanced CRM Features

While many systems offer some form of relationship management, a few of the vendors profiled in this guide have more advanced CRM capabilities embedded in their systems:

- **Salesforce Grantmaking:** Salesforce is the largest CRM platform in the market, and Salesforce Grantmaking is built directly in the platform.
- **Amp Impact:** Built on top of the Salesforce platform, Amp Impact leverages the CRM functionality of the platform and brings additional capabilities in the areas of templates and impact measurement to the core Salesforce offering. The system works with any existing Salesforce license.
- **akoyaGO:** This grants management system is built on and leverages the CRM power of the Microsoft Dynamics platform. It also integrates with all of the Microsoft Office 365 tools.
- **GivingData:** GivingData includes a variety of CRM capabilities that confer benefits both to the foundation and to grantees. Among them is robust interaction tracking, where interactions can be linked to individual contact records, organization records, and grant records. Interactions display as icons along a timeline within each record as well as in tabular format below the timeline.

In addition to systems with native CRM capabilities, several systems have pre-existing integrations with leading CRM solutions. **Foundation Cloud** has integrations with Blackbaud's Razors Edge NXT, Blackbaud CRM, Salesforce, and Virtuous CRM, and **SmartSimple Cloud** offers a SmartSimple Cloud for Salesforce product.

Systems that Assist Non-Technical Users

Foundation staff bring a wide range of comfort with technology to the table. As grants management systems support more aspects of foundation management beyond just the distribution of grant funds, a greater number of individuals at foundations need to work with the system. That means systems that provide high-touch customer support and features to help non-technical users are in demand, including the following;

- **Foundant Grants Lifecycle Manager:** This system provides two levels of customer support. Clients have access to unlimited phone and chat support, with live support available from 7 a.m. MT to 6 p.m. MT. Clients also have unlimited access to a "success team" that provides more in-depth assistance; the turnaround time for assistance from the success team is generally one-to-two days.
- **Impactfully by Foundation Source:** Foundation Source has created a number of features in its system to help users. These include a wizard that walks you through the steps of creating an application, including putting together a customizable welcome page, an eligibility quiz, and the application form itself. A variety of in-system help and tool tips are available, including icons users can hover over for explanations or pointers, help videos that pop up for some functions, and sections to provide feedback.
- **Temelio:** While still fairly new to the market, Temelio is developing a reputation as a flexible and user-friendly platform. The vendor is very focused on relationship building; new customers are assigned

an account manager at the start of implementation who continues to work with the client, even after launch. All clients receive unlimited ongoing support and configuration assistance for as long as they are a customer. Standard response time for support requests is 24 hours. Chat support is available weekdays between the hours of 8 a.m. and 9 p.m. Eastern, with 10- to 15-minute response times. Emails and chat support email is available to users of the grantee portal as well.

Systems with Business Intelligence Tools

Many of the systems profiled in this guide have good reporting tools, with the ability to create some types of charts and graphs and export the data to other tools for more in-depth analysis and reporting. However, foundations that want more sophisticated data analysis and visualization tools available within the platform have several options:

- **akoyaGO:** Microsoft PowerBI is embedded in akoyaGO. PowerBI-driven charts and visualizations can display as dashboards and can be downloaded for presentations and reports or shared externally via links. akoyaGO's Support and Technical Services teams can also help foundation staff create dashboards and reports in PowerBI.
- **Fluxx Grantmaker:** The vendor has developed a Grantelligence add-on module built on the Domo platform. Data is sent over to Grantelligence in a daily sync; you can upload files with data from other systems as well. Each Grantelligence instance comes with two pre-built dashboards. You can also build an unlimited number of custom dashboards using a drag-and-drop interface and share them with other Grantelligence users. At this time, you are not able to share charts or data with individuals outside the system, but you can export the charts as PDFs or use them in PowerPoints.

- **Foundation Cloud:** System dashboards are created via an in-system integration with Microsoft PowerBI, and are accessed via the Reporting section of the menu. The system comes with one out-of-the-box PowerBI dashboard and one impact tab with geographic heat map as well as the ability to create your own personalized PowerBI dashboards.
- **NextZen:** This new grants management platform from WizeHive includes an integrated third-party business intelligence tool available for subscribers to the vendor's higher-tier package. It can also be added on to their middle tier package for an additional cost. The system comes with five dashboards, but you can use the tool to build additional dashboards that feature a variety of visualizations. The tool uses a drag-and-drop interface to select data, and you can select the type of chart, add filters, and customize the appearance. Charts can be exported as PDF files.

Systems for Global Grantmakers

Funders who work in multiple countries often face a variety of challenges that their domestic counterparts are less likely to experience. This includes having to communicate with grantees in a variety of languages, make grants and track exchange rates in multiple currencies, and comply with different privacy regulations. The following systems support many of those needs:

- **Amp Impact:** Built for the global grantmaking marketplace, Amp Impact is heavily used in the international development sector. The platform leverages Salesforce's multi-currency functionality and builds additional multilingual capabilities on top of the pre-existing ones in Salesforce. It also includes out-of-the-box tagging functionality for U.N. Sustainable Development Goals on applications.
- **Blackbaud Grantmaking:** As a system with a large international presence, Blackbaud Grantmaking accommodates a wide variety

of currencies and you can specify on a per-program basis which currency types you want to show. The system does not have exchange rates built into the tool, but the vendor reports it has built simple custom calculate exchange functionality for customers in the past. The applicant/grantee portal accommodates multilingual content provided by the foundation. Applicants can choose their preferred language from the ones enabled by the foundation. An in-system AI translation function can help foundations by taking the first pass at translating the content, which the foundation can then fine tune in the software.

- **Fluxx Grantmaker:** Multi-currency support is available through an add-on for additional cost. This includes a native integration with the European Central Bank to capture exchange rates when a grant is submitted, when a grant is made, and when payments go out the door. The grantee/applicant portal and reviewer portal have a Google Translate plugin that can translate the content into a large variety of languages.
- **SmartSimple Cloud:** The platform supports true localization functionality for multi-currency tracking and uses Google Exchange as its default currency service. It also supports multiple languages, allowing users to switch from one language to another preferred language. Each field supports multilingual captions, help text, and validation messages. When users selects their language of choice, related language captions are displayed. In addition, the system also provides in-system field level translation features.
- **Submit.com:** The Ireland-based software company has a sizeable international client base. The software includes an alternate language dictionary that a foundation can use to create dual-language buttons and labels, as well as strong privacy and data protection controls that help foundations comply with GDPR requirements. The system currency can be changed depending

on the customer's locality, but multi-currency capabilities requires custom development. The vendor reports that it is developing additional multi-language support and translation capabilities, which it expects to release in 2025.

Systems that Facilitate Equity-Centered, Values-Driven, and Trust-Based Grantmaking

While equity-centered, values-driven, and trust-based grantmaking refers to a series of principles and practices in grantmaking, there are ways in which grants management systems can help facilitate those practices. These include providing a simplified application experience, flexible grantee reporting, and relationship management tools. Many of these features leverage new developments in AI. The following systems fit into this category:

- **GivingData:** With good relationship management functionality, this system has a variety of features to help you embed trust-based practices throughout the grantmaking process. Data can be surfaced in grant applications to help minimize the amount of data entry required from applicants, and features like the ability to exchange and update documents with grantees, interactions that are displayed across related records and appear along a timeline, and an exploration feature to help with budget planning help foundation staff conduct relationship-centric and collaborative giving.

- **SmartSimple Cloud:** As with many systems, new users can create a profile the first time they log into the grantee portal and enter an EIN to populate their organization profile with basic information. If an applicant already has a profile in the system, the application can be prepopulated with any of the data in the profile. The vendor has been developing a variety of AI-powered features for the system, several of which can be used to help advance equity-centered, values-driven, and trust-based grantmaking. One feature is the ability for applicants to upload PDFs of applications they have submitted

to other funders; the AI will parse, map the values to corresponding areas on a different application, and populate the fields. The vendor also offers AI transcription of audio or video recordings, which could allow grantees to upload reports as audio or video files that the foundation can transcribe for reporting.

- **Submittable:** The vendor has developed a new AI tool for applicants that's powered through a Chrome extension. It gives applicants the ability to track their answers to application questions, access a library of their saved answers, and autofill any answers that are recognized. If the tool doesn't find any matches, it will not autofill the form, but applicants will still be able to copy and use other answers in their libraries.

- **Temelio:** The system's grantee portals and grants applications have a variety of features that can help foundations minimize burdens on grant applicants. One of those features is the platform's AI assistant, which suggests responses to fields on the grant applications based on the applicant's previous proposals.

In addition to the features outlined above, three systems have created multi-foundation applicant portals that give applicants one login to access all of their applications and grants with funders that use the software: **Impactfully by Foundation Source, Blackbaud Grantmaking,** and **Fluxx Grantseeker** (a separate product not included in this guide).

Systems for Salesforce Customers

Thanks to its Power of Us program, which provides 10 free subscriptions to qualified nonprofits, Salesforce has a large footprint in the nonprofit and philanthropic sectors. Foundations have used the platform in a variety of configurations over the years, and now that the vendor is sunsetting its foundationConnect product in 2025 or 2026 and developing a new in-platform solution called Salesforce Grantmaking, organizations that want to use Salesforce as their CRM have new options to consider.

North Peak Solutions has developed a helpful resource that provides an overview of the different options for grantmakers using Salesforce called *"Comparing and Selecting the Right Salesforce Grant Management System for Your Nonprofit or Foundation."* This publication is free to download, though registration is required, and covers the basic architecture and functionality of three options: Outbound Funds Module, Nonprofit Cloud Grantmaking, and Custom Salesforce.

In addition to those three in-system implementations, several vendors either offer systems built on top of the Salesforce platform or that integrate with the platform. **Amp Impact** is built on the Salesforce platform and works with any existing Salesforce license. In addition to your Salesforce license costs, Amp Impact is licensed based on the size of the foundation's portfolio and provides a layer of additional functionality for templates, indicators, targets, and results.

SmartSimple is a certified Salesforce ISV that offers the SmartSimple Cloud for Salesforce integrated offering, and NPact's Foundation Cloud also includes a pre-built Salesforce integration.

Comparison Charts

Explore the Comparison Chart

System Profiles

akoyaGO
www.akoyago.com

Vendor: akoyaGO
Year Released: 2013

Pricing
The vendor provides custom pricing for the system based on the volume and complexity of grant programs. Pricing is all-inclusive; akoyaGO doesn't charge per module or have an a la carte menu. Implementation is priced separately and generally costs approximately 60 percent of the yearly subscription fee.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $7,500+
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $15,000+
- **Large Foundation (> $500 million in grants, 50+ staff):** $55,000+

Overview
Built on Microsoft Dynamics 365, akoyaGO leverages the power of a variety of Microsoft tools to provide a comprehensive grants management platform. Pre-built reports, queries, and dashboards mean that foundations with less-technical staff members can use the system essentially out-of-the-box, while larger foundations can take advantage of the platform's flexibility to create a system that conforms to their more complex processes and procedures.

The core akoyaGO system manages the grant lifecycle, with sophisticated relationship management and data visualization capabilities, while GOapply provides online portals for application intake and external reviews. The platform lives in the foundation's Microsoft 365 tenant and includes integrations with PowerBI (dashboards and visualizations), Outlook (email and calendar), SharePoint (document management), Excel and Word, PowerApps and PowerAutomate (workflows), and Co-Pilot (AI).

Grants Management
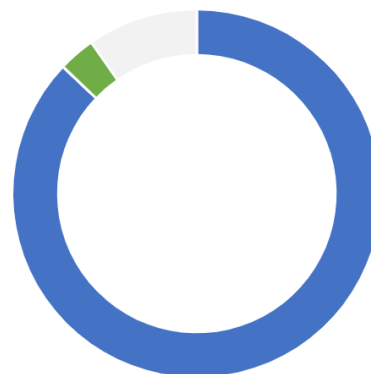
Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

akoyaGO is a full-featured grants management system that allows you to manage grants, scholarships, and relationships. A grant cycle dashboard provides an at-a-glance view of the current status of grant requests and awards in your workflow that lets you click through for full grant details. The system's Goverify function automates status checks against the IRS Business Master File and Publication 78, as well as the OFAC watchlist. The system also allows you to perform CRA status checks for Canadian nonprofits.

Goapply allows you to create a variety of forms and serves as the platform's external applicant, reviewer, and grantee portal. Applications can be public or invite-only. The foundation can specify the branding and color scheme used on the portal. You can create multi-stage applications with custom phases, eligibility quizzes, and branching logic using a drag-and-drop form editor. This editor allows you to specify the properties of questions, show or hide individual fields from reviewers, map questions to particular fields in akoyaGO, test forms within the system, and see what the form looks like across a variety of devices.

Foundations can specify the types of files that can be uploaded to an application, but there are no limits on the number of uploads or file sizes. All information collected on applications can be used in dashboards and reports on akoyaGO.

First-time applicants can register as individuals or organizations. When registering as an organization, they can use their EIN or tax ID number to pull up their organization's details or search for their organization by name. If the organization is already in the foundation's database, they will just be prompted to add themselves as a user. Organization data can then be used to prepopulate relevant fields in an application. In addition, if there are items that are in akoyaGO from either previous applications or from the organization profile that map to questions in an application, that can also prepopulate those fields. Applicants can print a blank version of the application and individuals within an organization can collaborate on an application. Applicants can also invite individuals outside their organization to add items to the application with the system's "3rd Party Contributor" feature.

External reviewers can see which review groups they are assigned to and can click through to see the applications assigned to each review group when they log into Goapply. The system supports multiple scoring schemes, although each different scheme needs to be its own review group. Reviewers can download the full application, including attachments. Applications can be set to either show or hide other reviewers' scores and comments when under review, and the system calculates summary and weighted scores.

Relationships and Constituent Management

Relationships & Constituent Management Overview
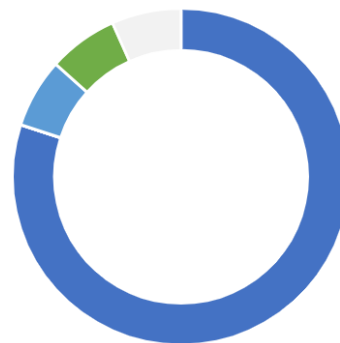
Core Functionality ■ Premium/enterprise ■ Workaround
Add-on ■ Integration ■ Custom dev
Not provided

One of the major benefits of akoyaGO is its strong CRM functionality. Built on the Microsoft Dynamics platform, it has both constituent (organization) records and contact (individual) records. All data fields on profiles are configurable. You can collect demographic data on records, but the system does not have a Candid integration to pull that in automatically. You can manage a wide variety of relationship types within the systems, including parent-child organization relationships and adding "connections" to organization records to capture relationships where an individual is associated with an organization but is not an employee.

A timeline on the right side of each record displays all interactions and activity. You can configure activity types that appear in the profile. The system's native Outlook integration means that you can easily capture emails and appointments created outside the system. You can sort and filter items in that timeline and pin an item to the top of the timeline, or click on a contact to send an email or launch a Teams meeting with them.
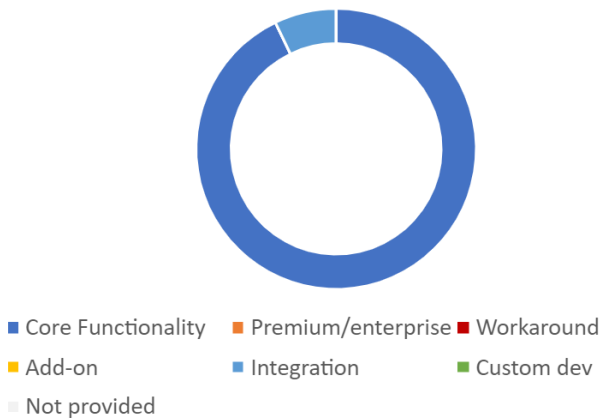
In addition to activity, you can see summary information around the organization's award and request history on its profile, including calculated fields that sum the number of requests, awards, and grant totals. This data is

displayed on a chart, as well.

Emails can be sent through the system to individuals and groups. You can also use integrations with MailChimp and Constant Contact for Dynamics 365 on the Microsoft AppStore for broadcast emails; you can track email opens and clicks in the system for broadcast emails sent via these two integrations. You can create email and document templates in the system and documents can also be created in Microsoft Word. All documents created in the system and uploaded to records are saved in SharePoint, and you can use Word and Excel to edit and save files directly within the system.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system allows you to set up and track grant payments and budgets. You can schedule grant payments and customize payment schedules, and you can make payments dependent on the completion of specific requirements. Program budgets can be set up to track the amount available, awarded, and paid out in a given year, and grants can be split across more than one program for budgeting purposes. You are able to set up subcategories within budgets and report on what's been allocated and what remains. You can also track budgets across multiple years. If you want to use the system for forecasting, the vendor will need to reconfigure the source data for program budgets.

akoyaGO has a native integration with the Microsoft Business Central ERP solution that provides accounting and more in-depth financial management tools. It also has a pre-built integration with BILL; the vendor reports that it has created integrations with QuickBooks Online for other clients.
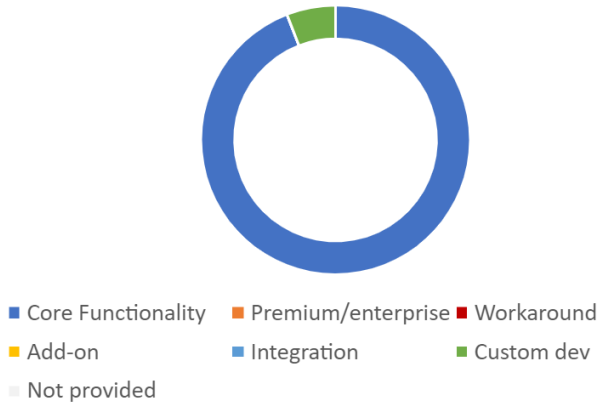
Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
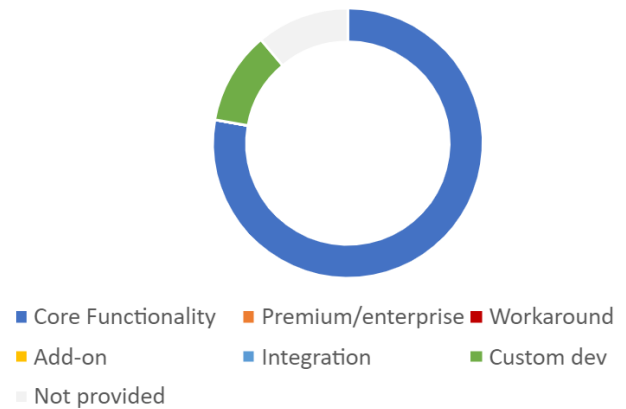
Automation and Integration
akoyaGO provides strong workflow capabilities. Workflows are created using PowerApps and Power Automate. You can set them up using drag-and-drop type functionality and you can create a variety of different workflows for records in the system. The system allows you to set up automated email notifications and reminders. You can also make batch updates to records in the system with file uploads.

Since the system is built on Microsoft Dynamics 365, developers can use the Dynamics 365 open API to create integrations. Power Automate is Microsoft's entry into the iPaaS market, providing integrations across all Office 365 apps. The vendor reports that any of the Dynamics 365 integrations available on Microsoft's AppSource will integrate with the platform. Some can be self-service integrations, while others require vendor assistance. Among those integrations are MailChimp, Constant Contact, Adobe Sign, DocuSign, and BILL.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

There is a universal search bar at the top of every page that allows you to perform a full system search. If you want to search th,e content of attachments, you would need to do so in SharePoint, where they are stored. The global search bar allows you to do fuzzy searches, so you don't have to worry about exact spelling, and it displays results by relevance.
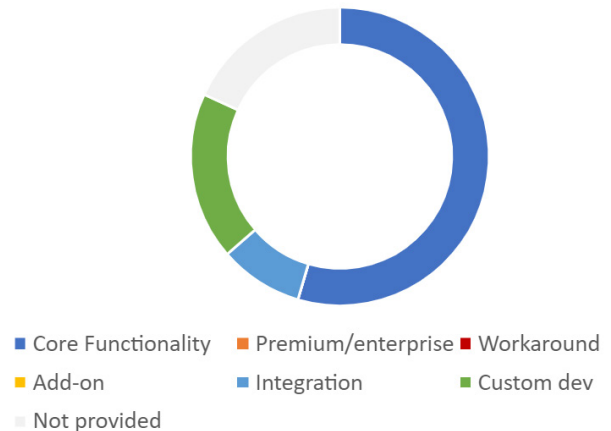
The system includes two different types of dashboards: PowerBI and Dynamics dashboards. Dashboards are permission-based and you can create a variety of role-based dashboards for different types of users. Users with the appropriate permissions are able to create their own custom dashboards as well and share those dashboards with other users. Microsoft PowerBI is embedded in the system, allowing you to create a wide variety of charts and visualizations for display as dashboards, to download for presentations and reports, and to share externally via links. akoyaGO's Support and Technical Services teams can also help foundation staff create dashboards and reports in PowerBI.

You can have different saved views of tabular information within different sections and can share those views with other users. Within those views, you can add or edit columns by dragging and dropping them from a list of all fields, filter results, sort column orders, and search within each column.

akoyaGO comes with a variety of pre-built reports. You can customize and save these reports or you can create ad hoc reports using any field in the system. You can favorite reports and schedule them to run at specified times. Reports can include calculated fields, so you can set up outcomes reports that can calculate progress toward goals. You can also run reports across programs.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
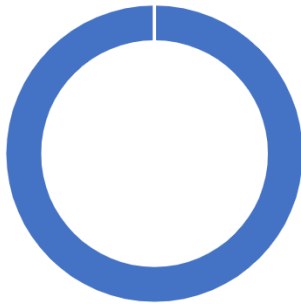- ■ Custom dev
- ■ Not provided

As a system built on Microsoft Dynamics 365, akoyaGO leverages accessibility features in the Dynamics platform and across Office 365 products. It is possible to configure the system to work with a variety of screen readers, create keyboard shortcuts, and enable keyboard navigation. The system is designed responsively to display across a range of devices and the Goapply form creator allows you to see how forms you create will display on a wide variety of devices.

You can create your own custom taxonomy in the system, but there is no pre-loaded default taxonomy and no predictive tagging of information entered into the system. The system supports multi-currency payments, but multilingual content and translation add-ons require custom development. You can use Microsoft CoPilot AI capabilities within the system, but by publication time the vendor was not aware of any clients who have done this.

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

As a product built on the Microsoft Dynamics 365 platform and housed in the client's Microsoft 365 tenant, akoyaGO leverages

Microsoft's enterprise-level security, privacy, and disaster recovery features. The vendor's SLA provides guarantees about system availability.

You can use single sign-on for user access to the system or require multi-factor authentication. Access to the system is governed by granular individual permissions, which allow administrators to provide or restrict access down to the field level. You can also create role-based permissions for larger groups of users. An audit log stores data on all changes made within the system. Data is encrypted both at rest and in transit.

	Included	Additional Cost	Not Available
Phone	X		
Chat			
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

System implementation is provided at an additional cost, which the vendor says is typically about 60 percent of the yearly contract price. The yearly contract does include phone and email support, with an average resolution time of two days for support requests. Some foundations also rely on the support and Technical Services teams for assistance in setting up PowerBI dashboards and reports. Client have dedicated account managers that are responsible for the overall relationship and who can facilitate interactions with the support team. The vendor says that chat support is on their development roadmap.

The GOsupport customer self-service module includes a knowledgebase and user forums,

although the forums are only somewhat active. The knowledgebase includes a variety of training videos. The vendor does provide frequent product update webinars and virtual user group meetings focused on different user roles. The vendor also hosts an annual user conference.

Customer Experience Survey
Number of Survey Respondents Using The System: 19
Percent Who Would Recommend The System: 84
Training Rating: 3.12/4
Implementation Rating: 2.95/4
Support Score: 2.87/4

Amp Impact

ampimpact.org

Vendor: Vera Solutions
Year Released: 2017

Pricing

The yearly license fee for Amp Impact is based on the size of the portfolio a foundation manages. This includes an unlimited number of users and projects. Yearly fees begin at $5,000 and go up to $125,000. You also need a separate license for the Salesforce platform; Amp Impact works with any Salesforce license. License fees include basic support, with premier support available at an additional cost. The vendor also offers managed services packages, which provide a specified number of hours of admin or engineering support for the system. Implementation is priced separately, with the cost scoped out based on the client's requirements.

Estimated Yearly Costs:

- **Small Foundation (< $25 million in grants, 1-5 staff):** $5,000-$20,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $30,000-$65,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $65,000-$125,000

Overview

Amp Impact is a grants management and impact measurement tool built on the Salesforce platform. That means the system leverages Salesforce's enterprise CRM, workflow capabilities, and reporting tools to deliver robust grants management and reporting functionality. The system allows you to define and collect a variety of outcome data from grantees during the application and reporting process and then easily track your progress toward defined goals across grants, geographic areas, and programs.

You can create a wide variety of reports, visualizations, and dashboards within the system. It also integrates seamlessly with

business intelligence tools like Microsoft PowerBI and Tableau, and even comes with pre-built PowerBI starter dashboard templates.

The system is used by a global mix of organizations located in 150 countries, many of which operate in the international development space. That means the system provides strong multi-currency support, as well as other features of interest to global grantmakers, like a native integration with the U.N. Sustainable Development Goals.

Grants Management
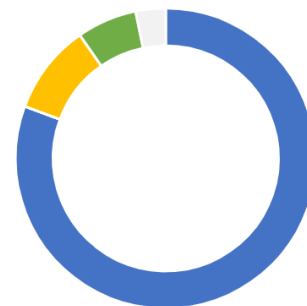
Grants Management Overview

Legend:
- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system supports multi-stage application processes, including eligibility quizzes, concept notes, and full applications. Applicants and grantees begin by logging into a branded portal, with new applicants able to create their own accounts in the system. Portals leverage the Salesforce Experience Cloud and are built using drag-and-drop functionality. Once they are logged in, applicants can see open funding opportunities, funding opportunities they have been invited to apply to, their current and past grant applications, and details about grant awards they've received. If grantees have the appropriate permissions, they can also update their organization details via the portal.

You can create numerous types of forms in the system using a template builder, including application, concept note, review, and narrative reporting templates. There is no limit to the

number of templates you can build in the system.

Forms are built using drag-and-drop functionality and can include rich text, picklists, multi-select lists, date fields, short and long text boxes, and file uploads. The vendor reports that it is adding checkboxes in the next release. Applicants can upload multiple files to applications; there are no restrictions on the types of files that can be uploaded by applicants, and the maximum upload size for a file is 25MB. You can paginate the forms, separating different sections into tabs. Forms can also include conditional logic, allowing for branching and skip patterns.

The system includes a tool that allows users to download an application into a Word file. The user can download certain tabular components of an application or grant—Targets, Budget, Activities/Milestones, Results—to an Excel file, work offline, upload it to the system, and then the system will extract the data and place it in the corresponding fields. The system will check the data on upload and notify the user of any errors in the form. The vendor reports it will be extending this Excel download/upload functionality to narrative applications and reports in an upcoming release.

When you are setting up your application form, you can collect impact indicators. These indicators can be related to different theme or program areas; if you tag an application with a theme it will automatically bring in the required indicators, and indicators associated with a specific call for applications can be automatically included in all forms related to that call. This allows for consistency in reporting. Indicators can then be surfaced when a grantee is filling out progress report forms and can be aggregated to report across grants and programs.

Multiple individuals within an organization can collaborate on an application. The vendor reports that it is releasing a free add-on later in

2024 that allows applicants to invite external collaborators to applications as well.

You can create a portal for external reviewers using Salesforce Experience Cloud at an additional cost. Review forms are created using the template builder and can include a variety of different scoring rubrics. Reviewers log into the portal to see the reviews assigned to them, and to complete review forms. Reviewers are notified by email when they are assigned reviews and you can set up automated email reminders to be sent prior to the review submission deadline.

You can monitor reviews to see how your reviewers are scoring different applications. You could drill into a review and see the reviewers' comments and scores. The system can calculate the overall score as well as provide scores section by section. The vendor offers an extension package that allows you to do weighted scoring of applications as well.

Once a grant is approved, you can schedule progress reports using a wizard. Reports can be scheduled along any timeframe you choose and can span multiple years. You can set up a variety of types of reporting forms in the system and associate them with programs. These reporting forms can include indicator targets that were identified during the application phase for ease of reporting. Grantees can receive an email reminder prior to the due date and can access and fill out the progress reporting forms in the grantee portal. Grantees can see their reporting schedule in the portal on each grant record as well as a list of all upcoming progress reports in the Progress Reports tab.

Relationships and Constituent Management

Relationships & Constituent Managment Overview
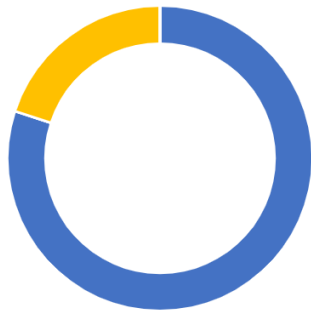
- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Amp Impact leverages the robust CRM tools of Salesforce to provide sophisticated profile and relationship management. Organization and contact records are Salesforce CRM objects and allow foundations to associate multiple contacts with an organization. The system allows you to store certain types of demographic data on records and additional data can be captured using custom fields. The system does not include an integration with Candid GuideStar Charity Check, Demographics via Candid, or OFAC, but offers a free add-on that provides a button you can click to search for the organization on GuideStar in a new browser tab either using its EIN or by name. The vendor notes it can build a reusable add-on to automate these checks.

You can capture and track a wide variety of interactions with organizations and contacts within the system. All system-generated interactions are recorded for each grant on both grant records and organization records. You can email individuals and groups within the system and Salesforce's integrations with Outlook and Gmail allows you to easily add emails sent outside the system to organization and grant records.

Email templates can be created within the system and you can include custom content from system fields in the emails. The ability to send personalized emails and letters en masse

requires either Salesforce's Marketing Cloud solution or an integration with a third-party tool, a variety of which are available through Saleforce's AppExchange.

A board portal can be created using Salesforce's Experience Cloud, which would be an additional implementation cost.

Financial Management

Financial Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Amp Impact's Disbursements feature allows you to set up payment schedules for grants and allows grantees to track payment installments and their status on the portal. You can make payments contingent on the completion of requirements or connect them to the achievement of milestones. Automated payment approvals can be set up using Salesforce's Flow automation tool. The system does not have an accounting module but can integrate with an ERP system or other accounting platform.

You can set up pools of funds for each program and use the allocation functionality to connect grant payments to one or more funds. For each fund you can see how much is available, how much has been committed, and how much has been paid out. Forecasting can be done across the portfolio and you can use Salesforce reports to create "what if" analyses.

Budgets can be built and tracked at the grant or program level. Foundation or grantee users

can use the system's Excel download/upload feature to draft and complete budgets and expenditure reports offline in Excel before uploading them to the system as structured data. The vendor reports a dynamic online budgeting and financial reporting feature will be released in Spring 2025, with the ability to embed it into applications and grant reports.

Automation and Integration
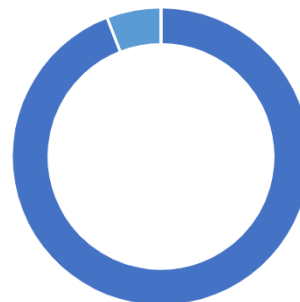
Financial Management Overview

- ■ Core Functionality ■ Premium/enterprise ■ Workaround
- ■ Add-on ■ Integration ■ Custom dev
- Not provided

The software leverages Salesforce's Flow functionality that allows you to configure numerous workflows and automations. You can use them for applications, reviews, reporting, and payments. You also can set up automated emails through workflows for notifications and reminders.

Salesforce's Dataloader allows you to upload files for batch updates of items in the system. Salesforce's APIs, Mulesoft iPaaS tool, and AppExchange allows you to choose from a variety of preexisting integrations and to build your own integrations if one does not already exist.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- ■ Core Functionality ■ Premium/enterprise ■ Workaround
- ■ Add-on ■ Integration ■ Custom dev
- ■ Not provided

Salesforce's AI-powered Einstein Search powers a universal search bar at the top of every page and will return results from every part of the system.

Dashboards can be customized for different groups of users and roles in the system. Users can also create custom dashboards using drag-and-drop functionality. Dashboards and reports can use a wide variety of charts and visualizations and you can drill down to get to the underlying data. You can also integrate the system with PowerBI or Tableau for more powerful data analysis and visualizations; Amp Impact comes with pre-built Power BI Starter Dashboard templates to extend Amp's analytical capabilities.

The system comes with 10 pre-packaged reports that can be cloned and customized. You can also use Salesforce's reporting tools to build custom reports and visualizations. Reports can include calculations, filtering, and grouping of data, and can be exported in Excel or CSV format. Users can subscribe to or follow reports from other users and reports can be scheduled to run at certain intervals and sent to individuals by email.

The key market differentiator for Amp Impact is its high-powered outcomes and impact reporting abilities. The system allows you to define frameworks, objectives, indicators, and
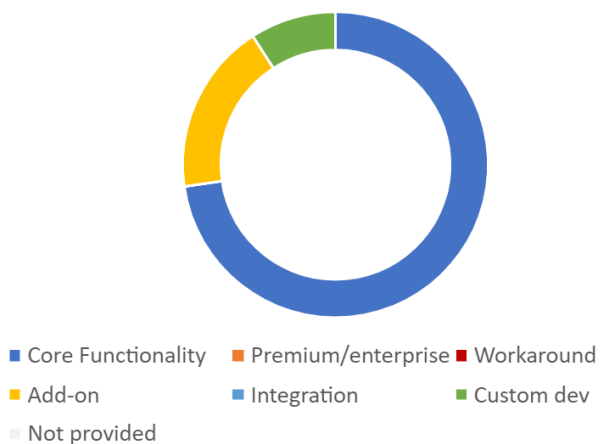
disaggregations. You can select indicators from a catalog of standard indicators or define your own. Quantitative indicators can be set up as percentages or numbers or you can set up qualitative indicators using picklists or rich text. Impact data can be defined at the program or grant level and indicators can be marked as required for a thematic area, which means they will automatically be added to applications and grant reporting forms tagged with that thematic area. You can make indicators required on applications and also allow grantees to add their own indicators, if desired.

Indicators from applications can be resurfaced on reporting forms for reference. When grantees submit reports with indicator data, they will automatically be added to the overall program impact reporting. You can monitor your progress on a results page, which displays stoplights for each indicator that progress from red to yellow to green as you approach your target. You can also use the reporting functions to dig more deeply into the data or visualize the results in charts.

Amp Impact provides the ability to use a catalog of standard Geographic Areas, Thematic Areas, Indicators, and Objectives. The system can come preloaded with the UN Sustainable Development Goals (SDG), SDG Targets, SDG Indicators and/or IRIS indicators to assist with monitoring outcomes. The vendor provides a library of reference data that contains common industry frameworks. You can also define your own custom taxonomy as needed.

The system includes Salesforce multi-currency support and allows administrators to set up and update exchange rates within the system. Salesforce's Translation Workbench is a built-in tool that provides all your field labels and instructions in an Excel sheet that you can provide to a translator and load back into the system once the translated values have been added. Amp Impact multilingual functionality allows not only the metadata but the data for Indicators, Frameworks, and Performance Graphs pages to be translated in up to four different languages at the same time, including different fields that are part of these objects.

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
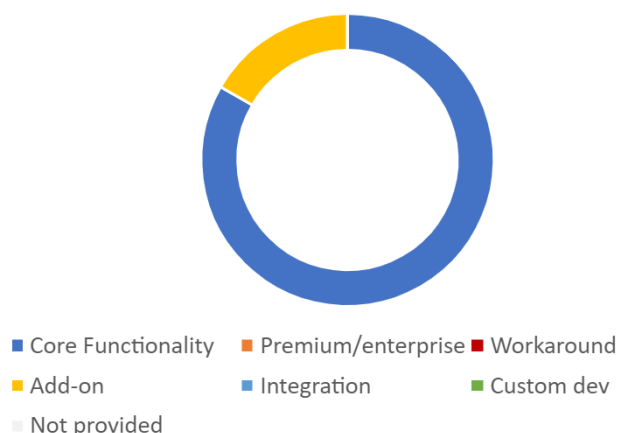- Add-on
- Integration
- Custom dev
- Not provided

Most of the platform is designed responsively to display across a range of devices; however, there are several custom Amp Impact components that were designed for browser-based interaction. Salesforce meets level AA of the WCAG 2.1 guidelines for accessibility.

Salesforce provides a great deal of information about its security policies on its website, and its Trust Center provides information about system status and privacy policies. In addition, the Vera Solutions privacy policy covers how the vendor handles data and client information.

Login security is protected by two-factor authentication, and the system can also integrate with SSO. Salesforce also offers an authentication app for mobile devices to provide additional security. Access to the system is governed by role-based permissions. Administrators have granular control to grant, limit, or restrict user access—not only to a wide variety of system functions, but also on a field-by-field and feature-by-feature basis. There are several different areas on the platform for which audit information is available, including: record modification, field history, login history, and setup.

You can configure encrypted fields on to any Amp Impact objects, but full encryption at rest requires the Salesforce Shield add-on. Data is encrypted in transit.

Training and Support

	Included	Additional Cost	Not Available
Phone		X	
Chat		X	
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

The license fee includes Amp Impact Standard Support, which offers email access to the Product Support team, access to all Amp Impact upgrades, and the system's knowledgebase (which includes documentation and training videos). Additional support is available via Managed Services engagements, which provides a dedicated analyst for support and product assistance. The vendor supports online client learning groups that allow users to connect with each other and the vendor reports that they are working to increase user interactions and expand the VeraConnect community.

Customer Experience Survey
Number of Survey Respondents Using The System: 4
Percent Who Would Recommend The System: 100
Training Rating: 3.86/4
Implementation Rating: 3.61/4
Support Score: 3.70/4

Blackbaud Grantmaking

https://www.blackbaud.com

Vendor: Blackbaud
Year Released: 2014

Pricing

Blackbaud Grantmaking offers two packages: Basic and Complete. The Basic package is designed to meet the needs of smaller organizations without complex workflows. The Complete package contains all the functionality of Basic and adds on a reviewer portal, budget module, and branch security. A set number of implementation hours are included in the package price, based on the selected package, and clients can add on extra services if they want to expand the scope of implementation. The vendor does not provide specific pricing for either package.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** Starts at $4,995
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** Starts at $17,295
- **Large Foundation (> $500 million in grants, 50+ staff):** Custom quote
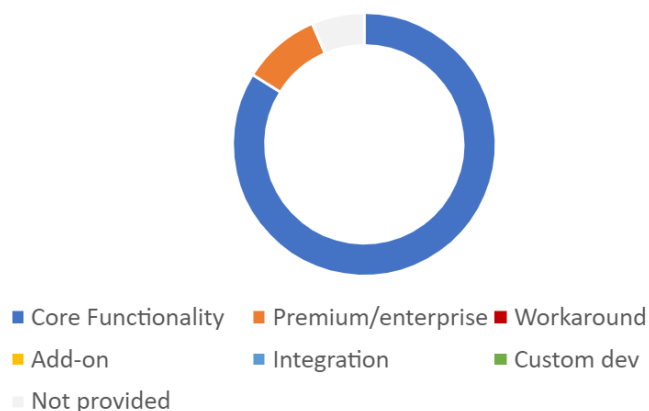
Overview

Blackbaud Grantmaking is a full-featured configurable system purpose-built for grantmakers. The system lets you track grants, organizations, and relationships with robust custom dashboards and 250 built-in reports. As a product being used by foundations and other grantmakers around the world, the platform supports a variety of currencies and multiple languages and provides access to an international database of nonprofit organizations.

A new applicant and grantee portal released in June 2024 provides a more constituent-centric experience; the portal displays all applications and grants the user has with any grantmaker using the Blackbaud Grantmaking platform.

The system will feel familiar to individuals with experience in other Blackbaud products. A low-priced Basic implementation of the system is available for small foundations looking for out-of-the-box capabilities, while larger grantmakers can get additional features and configurations to accommodate their more complex workflows.

Grants Management

Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system includes robust grant management tools. You can track grants through their full lifecycles, from application and review to payments to progress reports. Grant records contain the full content of the application, along with internal comment and discussion fields. Related record links appear in the left sidebar when a record is open, and you can connect grant records to organization records, payment records, activity records, documents, and requirements. You can set up individual workflows for each grant program. Automated charity status and watchlist checks can be performed when grant applications are received or can be manually triggered on organization records.

In June 2024, Blackbaud Grantmaking released a new applicant/grantee portal and application functionality that represents a significant change from its previous approach. The vendor's new portal is applicant-centric, in that it displays the user's applications across multiple funders who use Blackbaud

Grantmaking. This uses the Blackbaud identity management tool, which means that applicants can use the login they have for their own Blackbaud products to access the portal of any foundation using Blackbaud Grantmaking.

If an applicant is registering for the first time, they cannot prepopulate information in their profile with an EIN, but they can use their profile in Blackbaud's NPO Connect database to pull in some organization information. When a returning applicant or grantee logs in, they see all the applications they have in progress at the connected foundations as well as any grants that they've received and grant payment schedules. They can also use the portal to submit any required reports. To reduce duplicates, if they try to start a new application when there's already one in progress, the system alerts the applicant about the one in progress so they can continue to use that application rather than starting a new application. Applicants have the ability to make changes to their individual and organization contact information, which are then submitted with the application for review before being updated in the database.
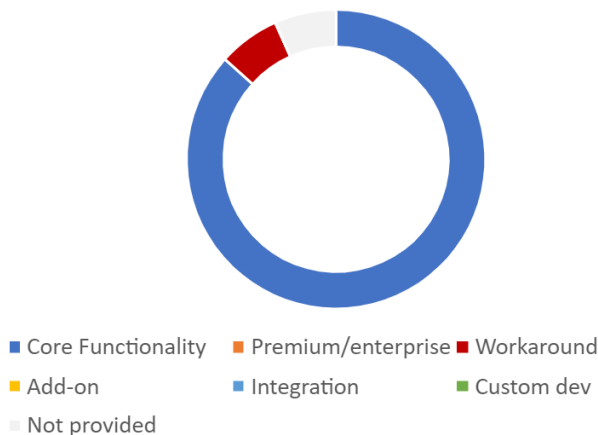
Applications can include eligibility quizzes and multiple stages, forms can be used across multiple programs, and conditional logic lets you create a form that walks applicants through some questions to route them to the correct application for their needs. Multi-stage applications can be prepopulated with information from previous stages. You can add a logo to the application, but there is no ability to change fonts or colors. Forms can include a variety of field types, including calculated fields and a basic sign-and-submit functionality. The system has a size limit of 99MB for individual file attachments on a single application, but there is no limit on the number of documents you can upload. There are no storage limits in Blackbaud Grantmaking.

Once an application is submitted, it moves into a holding area for foundation staff to review and add to the database. As part of this review, the system runs a duplicate check and flags any information that may need to be reviewed or updated. If additional information is needed, foundation staff can decide to send the application back to the applicant with a request for updates. Applications can also be sent back to applicants for additional information after they are entered into the system.

After applications are brought into the system, they enter the foundation's review workflow. Blackbaud Grantmaking allows you to create a variety of different scoring and evaluation rubrics. You can bulk assign reviewers to an application or assign them individually. Administrators can monitor the progress reviewers are making and can message them individually or in bulk as well, if needed. A reviewer portal is available as an optional add-on so the foundation can involve a large number of reviewers in the process. On logging into the portal, reviewers can see applications assigned to them, any announcements or messages from the foundation, and any discussions that they are a part of. Administrators can specify which parts of the application they would like reviewers to see and whether they can see other reviewers' scores after they submit their review. Reviewers can download applications in a PDF format (which includes attachments) to view them offline but need to be online to enter their scores and comments.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system supports both organization and individual contact records. You can define a variety of relationships among contacts, including parent/child organization relationships and affiliate relationships. Each record has quick links to related records on the sidebar, including grant requests, payments, requirements, documents, activities, and more. You can log a variety of interactions on the record, including meetings and phone calls; the foundation can define the list of interaction types. Organization records include embedded due diligence capabilities, including a verification of tax status, a Candid GuideStar Charity Check, and international terror watch list checks. You can set up custom fields to collect demographic information on organization records, but the system does not bring this data in from any third-party sources.

You can send emails to individuals and groups through the system. When you click on a record to send an email, you have the option to do a quick send (send the email from your default email program, such as Outlook) or to send from a template. The system supports email, letter, and document templates. A recent document management release provides an integration that includes view and edit capabilities with Microsoft Office documents. While there is no plug-in or integration with Outlook or Gmail, the vendor notes that you

can bring emails sent outside the system into the record through drag-and-drop functionality.

You can generate grant summaries and other reports for Board meetings. The system does not include dedicated Board portal functionality, but the vendor reports that you can use the Reviewer portal—an optional add-on at extra cost—to serve as a Board portal as well.

Financial Management

Financial Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided
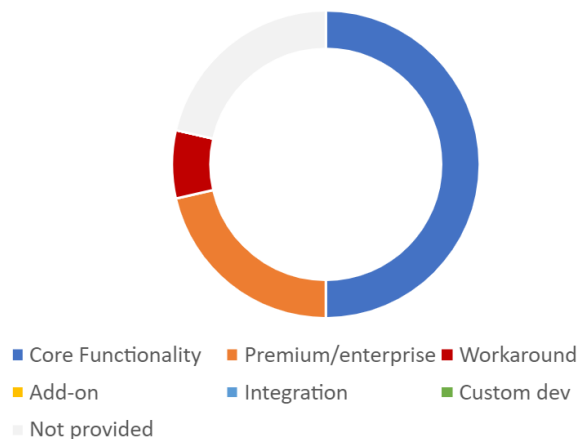
The system provides strong payment scheduling and tracking functionality. You can set a default schedule for grant payments or customize a payment schedule. Payments can be made contingent on the completion of requirements. Payment requests can move through workflows and you can set up automated approvals of upcoming payments. The system securely stores banking information for ACH or wire transfers. There are no pre-existing integrations with accounting software, but you can export and import payment data in CSV format and the vendor reports that you can use Blackbaud's SKY API to create custom integrations with accounting solutions. An optional budget module available at an extra cost allows foundations to build out budgets and track payments against those budgets. As grants are awarded, you can apply the payments against budget line items and track your drawdowns. If you have a percentage goal for granting, there is a

dashboard ticker that will show your progress toward that goal. The budget module also allows you to do forecasting. If you have a grant payment that you want to split between two different budgets, you will need to do a bit of a manual workaround by splitting the payment into two different records, one for each budget.

Automation and Integration

Automation & Integration Overview

■ Core Functionality ■ Premium/enterprise ■ Workaround
■ Add-on ■ Integration ■ Custom dev
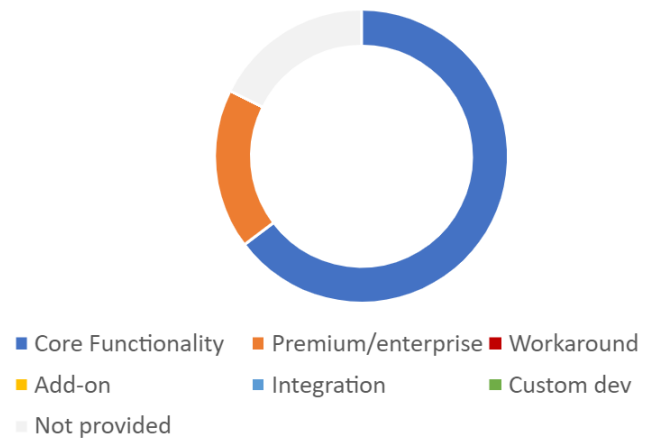■ Not provided
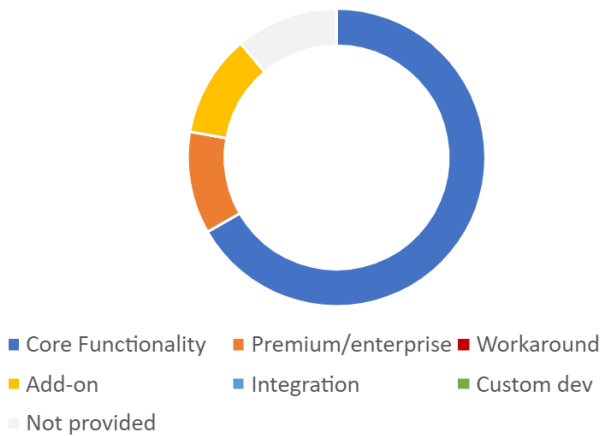
You can set up a wide variety of workflows organized by grant program in the system. A workflow dashboard lets you track where records are in the various stages of workflow. You can move records along the workflow manually or you can set up automations that move the records along based on another action in the system. Automated emails can be set up for notifications, actions, and reminders. You can schedule them in the system or set them up when creating a new grant application.

Blackbaud's SKY API continues to be expanded, and the Grantmaking product has payment endpoints and organization endpoints set up in the system. In June 2024, the vendor released additional endpoints for requests, activities, contacts, and requirements. Additionally, SKY addins allow developers to build integrations that look native to the platform, and the vendor reports that it is in discussions to expand the integrations available for Blackbaud Grantmaking.

Several types of batch updates can be made in the system, including generating correspondence, task assignments, reviewer assignments, and status updates. You can also do batch updates for several attributes and actions on payment records. The system currently has pre-built integrations with Blackbaud Raiser's Edge NXT and Candid GuideStar Charity Check, and other integrations can be creating via the API.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

■ Core Functionality ■ Premium/enterprise ■ Workaround
■ Add-on ■ Integration ■ Custom dev
■ Not provided

A universal search bar allows for quick searches for requests (grants and applications), organizations, and contacts, with a full system search link as well. The full system search does not include the contents of attachments uploaded to the system. Searches can be done with partial matches, but there is no fuzzy search functionality.

System dashboards are all configurable by individual users, and users can create their own dashboards and share them with other users. The vendor does provide some standard dashboards that are delivered at time of implementation. You can add parts (widgets) and tabs to dashboards. A team dashboard can be shared with other team members to monitor KPIs and other relevant metrics. Dashboards can include charts and graphs, lists, and other types of visualizations. You can drill down to the underlying records by clicking on a visualization.

The system comes with 250 standard reports. Standard reports cannot be copied, but users can change and update the filters. Ad hoc reports can be built using the full system search interface and adding filters to focus on the criteria you want. You can copy and edit ad hoc reports to create new ones. Reports can be scheduled and can also be exported in a variety of formats: PDF, HTML, text, Word, Excel. There's no limit on number of reports in the system.

You can use the system ad hoc reporting to create your own outcomes or impact reports based on data collected from grantees. There is also an optional add-on at an extra cost that is focused on outcomes reporting, which is built to correspond to the data and outcomes that comprise the United Nations Sustainable Development Goals.

Technical Considerations

Technical Considerations Overview

■ Core Functionality　■ Premium/enterprise　■ Workaround
■ Add-on　■ Integration　■ Custom dev
　Not provided
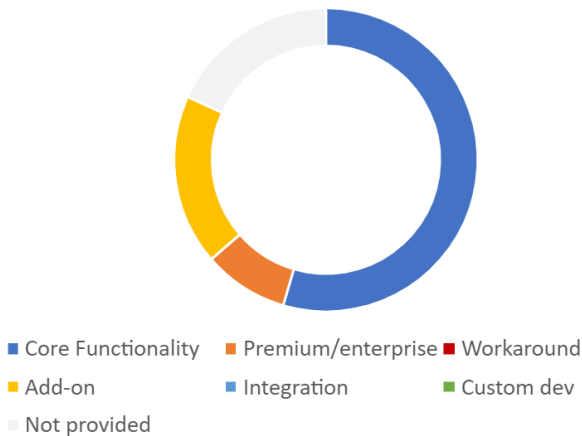
Blackbaud Grantmaking and the new grantee portal are mobile-friendly so that it displays across a variety of devices. The system is not WCAG 2.1 compliant, but the vendor notes that accessibility features are on the development roadmap.

Foundations can set up their own taxonomies during implementation, but the optional Outcomes module does come with the U.N. Sustainable Development Goals pre-loaded.

As a system with a large international presence, Blackbaud Grantmaking accommodates a wide variety of currencies. You can specify on a per-program basis which currency types you want to show, but the system does not have exchange rates built into the tool. The vendor reports that it has built simple custom calculate exchange functionality for customers in the past. The applicant/grantee portal accommodates multilingual content provided by the foundation. Applicants can choose their preferred language from the ones enabled by the foundation. An in-system AI translation function can help foundations by taking the first pass at translating the content, which the foundation can then fine tune in the software.

Security and Privacy

Security & Privacy Overview

■ Core Functionality　■ Premium/enterprise　■ Workaround
■ Add-on　■ Integration　■ Custom dev
　Not provided
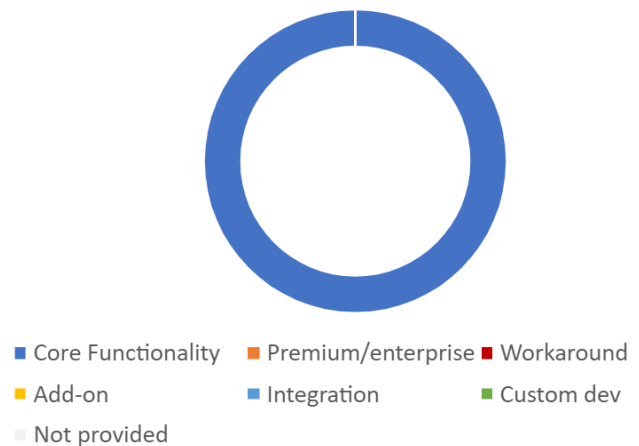
Blackbaud's Security and Privacy policies provide a detailed guide to how data is secured and protected across the company's many software platforms. Administrators have the power to grant, limit, or restrict user access to a wide variety of system functions. An audit log records all system access, actions, and changes. Login security is protected by multi-factor authentication and single sign-on is available. All system data is encrypted at rest and in transit.

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat	X		
Email			X
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation	X		

Phone and chat support is available for all foundation clients. Applicants having problems with the portal need to go through the foundation for support. Live support is available Monday through Friday 8:30 a.m. through 6 p.m. ET, excluding holidays. There is also a knowledgebase, user community, and recorded training videos. BlackbaudU offers some free training and several subscription levels for more in-depth coursework. Implementation hours for new clients are included in the yearly subscription price, and foundations can purchase additional implementation support hours as needed.

Customer Experience Survey
Number of Survey Respondents Using the System: 23
Percent Who Would Recommend The System: 65.4
Training Rating: 2.74/4
Implementation Rating: 2.96/4
Support Score: 2.58/4

Fluxx
www.fluxx.io

Vendor: Fluxx
Year Released: 2010

Pricing
The vendor notes that yearly subscription pricing is determined by the foundation's annual giving and the number of add-on modules—for example, the Grantelligence BI tool, the reviewer portal, and integrations with external finance and/or CRM systems. All subscriptions include unlimited users, data usage, and document storage, as well as integrations with Candid Charity Check, Demographics via Candid, Microsoft 365, Docusign, and OFAC.

Implementation costs are not included in the yearly subscription pricing; new customers can choose one of four onboarding packages that range in price from $10,000 (Quick Start) to more than $54,250 (Transformation) depending on the amount of personalization the customer wants configured by Fluxx vs. by the customer post-implementation. Quick Start is a fast-track implementation that can get the system up-and-running in 4-6 weeks, with out-of-the-box functionality and self-service data migration. Other implementation packages offer more in-depth configuration and personalization of the system.

Estimated Yearly Costs
- **Small Foundation (< $25 million in grants, 1-5 staff):** $13,500-$35,500
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $36,500-$267,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $300,000+

Overview
Fluxx Grantmaker is a widely-used grants management system that is built around a relational database, which allows foundations to easily link related records and data across the system. The default system dashboard

is set up as a series of unique, customizable, shareable cards, similar to a Kanban board, but users can also opt to view the system data in a more traditional tabular view. Cards can be arranged on the dashboard with drag-and-drop functionality. The optional Grantelligence add-on provides foundations with a powerful business intelligence tool built on the Domo platform that pulls in system data for in-depth reporting and that allows you to upload external data sources as well.

The majority of the vendor's current customer base are mid-size and small foundations, public charities, and government organizations, but a significant number of large grantmakers use their platform. The vendor has a large presence in North America, Europe, and the Asia Pacific region. Global grantmakers are able to take advantage of the system's online Google Translate integration for their external portals, as well as strong multi-currency support.

Grants Management
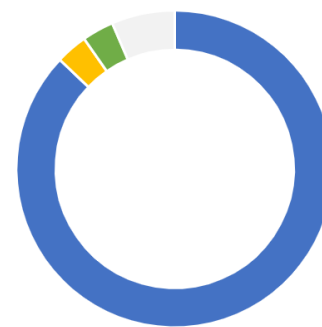
Grants Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The structure of Fluxx Grantmaker is such that related records are connected across the database, providing a holistic view of grants, grantees, and activities. Connected data appears in a tab on the top right of records, giving you the ability to click through to related organizations, contacts, and requests. Within a grant record, you can view interactions; assign tasks around the record to other staff members; use the system's internal messaging

tool (Signals) to tag other system users or applicants and create threaded discussions; add notes; create a risk register; and run due diligence checks. An integration with Candid GuideStar Charity Check allows you to use an organization's EIN to save a certificate to the record that shows it was run against IRS information. It will also allow you to pull in additional data from GuideStar, such as the organization's NTEE code, foundation code, and charitable status. Charity Check can be run on grant records or on organization records.

The system supports a variety of application types and processes. You can have individual and organization applications, open or invitation-only solicitations. There is no limit to the number of funding opportunities that can be open at the same time. Each program or funding opportunity can have its own application with different requirements, questions, and workflows. Ten different field types can be used in applications; applications can include branching and conditional logic and can capture impact metrics that can be used for future tracking and reporting. An integration with DocuSign allows foundations to capture signatures on applications. The vendor is currently testing a grant budget tracker that allows applicants to add line items to a budget that are then totaled in the sheet, and which can later be used to make expense reimbursement claims after the grant is approved; this feature is currently in use by a handful of customers and the vendor expects to release it later in 2024.

Multiple users can work on applications together, and you can add logic to limit the ability for a particular user to submit the application. The system also allows for a collaborative workspace where grantees can be linked to multiple organizations or multiple users to the same organization so that they can complete shared applications, submit follow up reports, and submit claims and reimbursements.

A grantee portal allows applicants and grantees to register for the system, view funding opportunities, see their grant history, submit reports, and check on grant payment schedules. They can request amendments and renewals, as well. The items users can see and take action on in the portal are governed by roles and profiles. Administrators can map eligibility requirements to each funding opportunity in the system and can show or hide certain things in the portal based on those eligibility requirements.

Organizations, primary contacts, and users don't have to re-enter information already stored in Fluxx Grantmaker, or information they entered when registering for the applicant portal. There is no auto-save function in applications; applicants need to click the "Save and Continue" button in order to save the data they've entered. There is not currently the ability for applicants to complete applications offline and sync the data with the system after completing them, but the vendor reports it has created this functionality for another customer using fillable Adobe PDF forms and custom code.

A reviewer portal is also available as an optional add-on at an extra cost. This portal allows reviewers or panelists to see their assigned reviews and complete score sheets. Reviewers can see the score sheet side-by-side with the application, and you can control what application content reviewers are allowed to see. Administrators can determine whether to allow reviewers to see other reviewers' scores once they submit their score sheets. You can perform a variety of calculations to get the total score, as well as average score, weighted scores, and rankings.
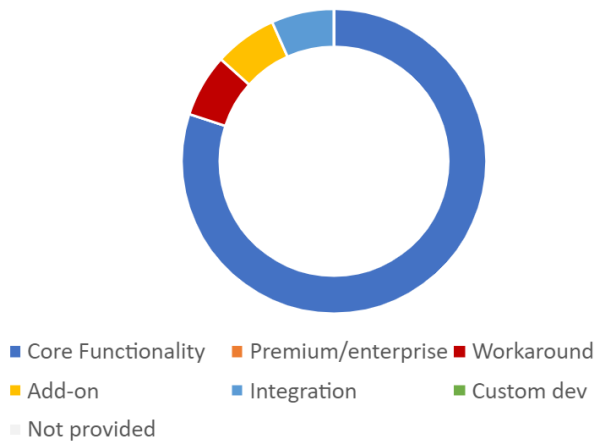
You can assign reviewers on a record-by-record basis or by using bulk actions; reviewers can be grouped together. When you assign an application to a reviewer, they will be notified via email. Reviewers can download the full contents of an application, but there is no way

to complete reviews offline and have them sync with the system.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

While not technically a CRM, Fluxx Grantmaker allows you to collect a great deal of information on contact records and to define relationships with other records across the system. The system supports both organization and individual records. Organization records can include data from the system's integration with Candid Guidestar Charity Check, as well as demographic information from the system's integration with Demographics via Candid. The demographic data synced from Candid displays on the record with the visualizations, but you are not able to use that in system reports. You can create relationships between records in the system that link out to other organizations, contacts, grants, or requests.

Fluxx comes pre-built with a card designed to track interactions, including meetings, phone conversations, and site visits. The Interactions card allows users to track interactions against the organization, contact, or application/grant record. You can also add custom fields to capture notes and other items. You can send emails through the system to individuals and groups. There are also integrations with MailChimp and Constant Contact for broadcast emails, and email opens and clicks from these tools are saved on individual records. Correspondence sent through the system is

automatically saved to the contact record and a free Microsoft 365 integration allows you to save emails and attachments sent and received through Outlook to grant, organization, and payment records.

Templates for emails and documents can be created in the system, and you can also create templates within Microsoft Word via the Microsoft 365 integration. New versions of documents edited in word can be synced back to the system and managed with version control functionality. Documents generated from templates can be either PDF or Word format and are saved on the associated grant or organization record.

The system allows you to use the reviewer portal add-on to create a dedicated view for Board members that displays filtered cards and records relevant to their work. You can also build out cards for board meetings, adding grant summaries and other records for review.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
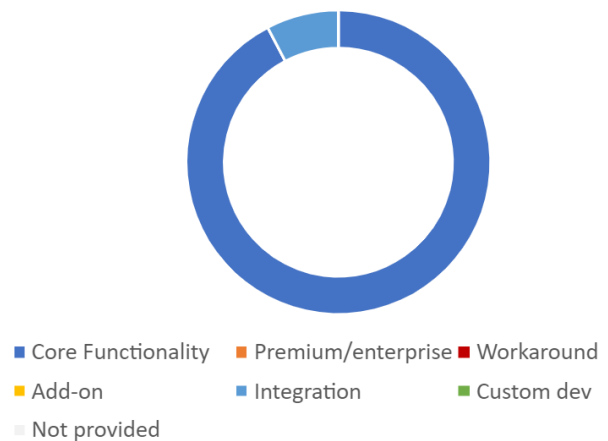
Fluxx Grantmaker allows you to create payment schedules in several different ways. You can set up a default payment schedule, you can schedule payments individually, or you can schedule them in bulk. Once you schedule the payments, you can edit individual dates and make payments contingent on reporting requirements. You can split payments for a grant across multiple budgets. You can also

store banking information for organizations securely in the system, masking account numbers once they have been uploaded.

The platform has integrations with a variety of finance platforms, including Oracle NetSuite, Sage Intaact, QuickBooks, and SAP. These integrations are available at an additional cost. You can also transfer payments data to other finance and accounting systems via CSV file exports and imports. When records are marked as ready for payment in the system, it will deduct the payment from the assigned budget, and once record of the payment has been received from the external finance platform or the completed CSV file is uploaded, it will mark the records as having been paid.

Budgets can be tracked by either the amount available, awarded, or paid in a particular year, or in hierarchically defined categories or program areas. Administrators can use previous years' budgets as a base and adjust them for the current year and also use fund budgeting to predict cashflow needs based on scheduled payments. Program Related Investments (PRIs) have their own unique category within the system, which allows them to be stored, tracked. and reported on as a separate type, as well as tracking payment and repayments (with interest against the original award and funding source).

Automation and Integration

Grants Management Overview
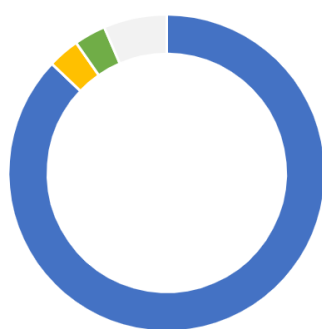
- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Depending on the implementation package selected, the vendor will work with new customers during their onboarding to build out a series of workflows based on the foundation's grantmaking processes. New customers who select the Quick Start implementation package will receive a best practice-based workflow that comes out of the box but also have the ability to set up their own custom workflows within the system. You can have multiple workflows set up in the system and workflows can include conditional logic. Workflow buttons display at the bottom of the screen whenever you are viewing a record to allow you to easily update status. The workflow status bar can also be used to move records through the process and displays the current number of days a record has been in its current workflow state.

A large variety of automated emails can be set up in the system, including for task assignments, email reminders of payments coming due, reports coming due, and deadlines for applications to be submitted. The system will also send out automated reminders at set intervals. All these communications are saved within the corresponding records. The system also includes a number of bulk actions that you can perform on multiple records, including scheduling payments, updating workflow status, task assignment, email alerts, and document generation.

Fluxx Grantmaker includes a REST API available to all customers that allows them to build custom integrations with a variety of systems, including financial and accounting platforms, CRM systems, and business intelligence tools. It also has a connector with the iPaaS tool Workato that can be used to build integrations with systems like Salesforce and Sage Intacct. The vendor reports that it is currently building connectors with both Power Automate and Zapier that will be available later in 2024.

Fluxx Grantmaker offers numerous integrations with finance and accounting tools (Oracle NetSuite, SAP, Sage Intaact, QuickBooks, BILL,

TECHIMPACT®

Concur) and email broadcast tools (MailChimp, Constant Contact), as well as integrations with Microsoft 365, Docusign, Candid Guidestar Charity Check, Demographics via Candid, and Google Translate. The integrations with finance tools are at an additional cost.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
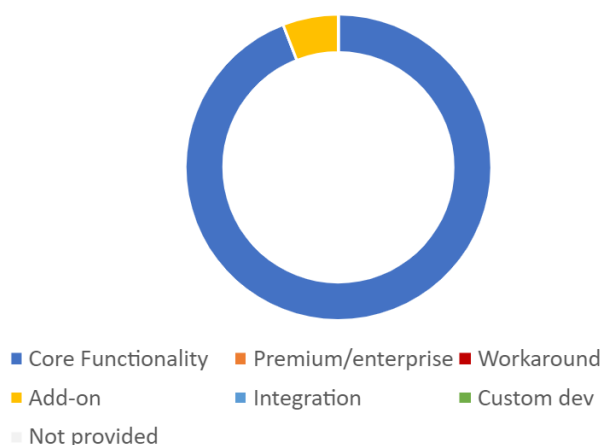
There are two types of dashboards available for Fluxx clients: system dashboards, and dashboards via Grantelligence, a business intelligence tool available at an additional cost. System dashboards are comprised of cards. Cards that come standard with the system have data on grants management, budgeting, contact management, project management, reporting, due diligence, interactions, board meetings, and risk registers. You can also build out additional cards to store data in the system. You can display the contents of cards in summary view for quick data insights or list view for more detailed information.

The card-based system dashboard can also be switched to a more traditional table dashboard. From this view, you can change columns using drag and drop functionality, and filter records by status, program lead, the type of application, source of funding, other advanced level fields, or custom fields. You can also export all this information in a variety of formats. If you select a subset of records, you can enter "focus" mode, which automatically filters the connected data in the tabs at the top

of the table so that it is only for the records you are focusing on.
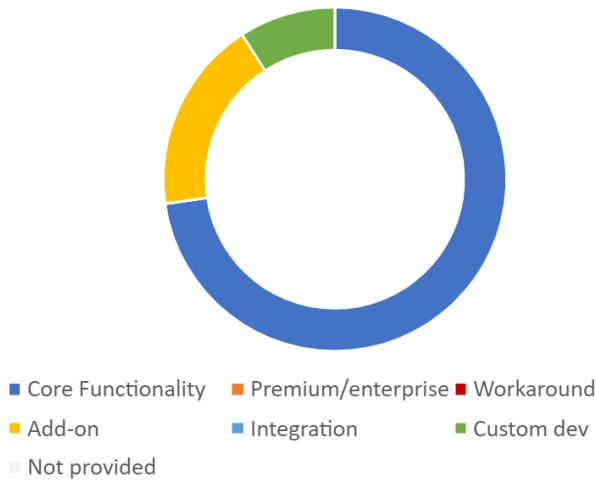
Fluxx Grantelligence is a new analytics and reporting tool built on the platform Domo that is integrated with Grantmaker and available at an additional cost. Grantmaker data is sent over to Grantelligence in a daily sync and you can add external data (file uploads) as well. Each Grantelligence instance comes with pre-built datasets and two pre-built dashboards: the Grants Manager dashboard, to track things like programs, payments, assignment of tasks and records within the system; and the Executive dashboard, which shows how much is attributed across programs against budgets and geolocations. The vendor reports that additional pre-built dashboards will be available later in 2024. You can also build your own dashboards in the system using a drag-and-drop interface, with no constraints on the number of custom dashboards, and you can share those dashboards with other Grantelligence users. The dashboards are interactive, changing as you filter data. You cannot click through to source records in Grantmaker, but you can drill down to see the data used in the datasets and visualizations.

There are more than 7,000 visualization types within Grantelligence. At this time, you are not able to share charts or data with individuals outside the system except via an export of the charts as PDFs or PowerPoints. There are a large variety of data visualization options for reports run in Fluxx Grantmaker, as well. When you look at data in graph view, they can appear as line or bar or pie charts and you can easily change the X and Y axis data. There is also a funnel view that shows how long it takes to process grants in certain stages of workflow. Fluxx Grantmaker comes with 15 pre-built reports that were sourced from the Fluxx community. You can also create ad hoc reports using a drag-and-drop builder. Ad hoc report data can be exported in CSV, PDF, and Excel formats. You can mark any report as a favorite and schedule them to run once or over time;

reports that run over time are managed by version control. You can also create report templates in Excel via the Microsoft 365 integration.

Technical Considerations

Technical Considerations Overview

Legend:
- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Fluxx Grantmaker is accessible for users with disabilities, with the vendor reporting that it is compliant with WCAG 2.1 guidelines. It is designed responsively and can display across a variety of screens. The system comes preloaded with the Foundation Center's geographic hierarchy, but the taxonomy is generally built out when working with new customers during implementation.

Multi-currency support is available through an add-on at additional cost. This includes a native integration with the European Central Bank to capture exchange rates when a grant is submitted, when a grant is made, and when payments go out the door for those records. You can also make manual updates if you're using a currency that is not recorded by the European Central Bank. The grantee/applicant and reviewer portals have a Google Translate plugin that can translate the content into a large variety of languages.

Security and Privacy
Fluxx provides some information about its security policies and SLA in its Master Services Agreement and Privacy Policy. All data in the system is encrypted both at rest and in transit. An un-editable audit log is available in the system, which notes what attribute was updated, what it was, and what it was changed to—as well as by who—with a timestamp.

Multi-factor authentication helps protect the security of logins, and single sign-on is available with an add-on at extra cost. System access is governed by role-based permissions, and administrators have the ability to grant or deny system privileges on a granular basis.

Training and Support

	Included	Additional Cost	Not Available
Phone			X
Chat			X
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

Support for Fluxx Grantmaker and all its components, including Grantelligence, is provided through an online ticketing system and is available from 1 a.m. to 5 p.m. Pacific Time. The vendor provides a knowledgebase, training videos, webinars, and a user community. It also provides free training to customers for the first two years that they use the system. Grantelligence training is also available for foundation staff at no extra charge.

Implementation costs are not included in the yearly subscription pricing; new customers can choose one of four onboarding packages that range in price from $10,000 (Quick Start) to more than $54,250 (Transformation), depending on the level of personalization the customer prefers is done by Fluxx instead of by the customer post-implementation.

Customer Experience Survey
Number of Survey Respondents Using The System: 40
Percent Who Would Recommend The System: 87.5
Training Rating: 2.74/4
Implementation Rating: 2.67/4
Support Score: 2.76/4

Foundant
www.foundant.com

Vendor: Foundant Technologies
Year Released: 2006

Pricing
The vendor did not provide specific pricing for the system but noted that subscription packages for Grant Lifecycle Manager (GLM) range from $4,250 to $9,500 per year, with a two-year contract. Organizations with more complex financial needs receive pricing based on assets under management (AUM). Foundant offers three license options for GLM, which govern the availability of certain features. For example, the Basic license does not include eligibility quizzes or advanced automation, and also includes a limit on file sizes. The yearly subscription fee does not include implementation.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $4,250-$9,500
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $4,250-$9,500
- **Large Foundation (> $500 million in grants, 50+ staff):** $4,250-$9,500

Overview
Grant Lifecyle Manager is a system designed for foundations of all sizes that have relatively simple grant processes. The system includes a predetermined grant workflow with stages that you can turn off and on; it allows for a one-to-three stage application process, up to two evaluations, and an unlimited number of post grant requirements. User access to the system is governed by six preset roles, with a limited ability to configure permissions for one of the roles. Payment and budgeting functionality within the system is fairly simple, and foundations that need more financial management resources have the option of adding on the vendor's CommunitySuite product, which was developed to meet the needs of community foundations and other organizations with more complex financial management needs.

With unlimited phone and chat support, as well as access to more in-depth expertise and an extensive library of training videos and recorded webinars, Foundant provides a lot of resources to help clients use the system effectively.

Grants Management
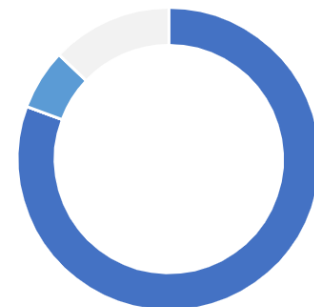
Grants Management Overview

Legend: Core Functionality, Premium/enterprise, Workaround, Add-on, Integration, Custom dev, Not provided

The system calls different grant programs "processes." You can track grants from application through review, award, and post-award reporting. Each process uses the simple workflow that is baked into the system as a base, and administrators can turn various stages on or off. The stages are eligibility quiz, LOI, application, decisions, and follow-ups.

Eligibility quizzes can be used for either basic eligibility checks or to funnel applicants to the programs that are the best fit. Application forms include branching logic and a table function that allows you to build questions into a matrixed layout and add in some calculated fields. Applications can include attachments, but there are file size limits on attachments to applications for foundations with the Basic license; Standard and above subscriptions do not include any limitations on file sizes.

Applicants can download a list of the questions on the form to help plan their responses and can also download a PDF version of the completed application. Organization information from the applicant's profile is prepopulated on application forms. An integration with Demographics via Candid provides applicants with the ability to pull data directly from their Candid profiles and add it to their applications if the foundation included Candid-connected questions on the form. Applicants can also copy answers from previously submitted applications into new applications.

Applicants and grantees can access their active and past grant requests, as well as their organization information, in a streamlined view of the system that functions as a grantee portal. They can manage contacts within their organizations and invite other users, both inside and outside their organization, to collaborate with them. They can also view upcoming report due dates and submit any follow-up reports needed for their grants through the portal. Foundations can also designate follow-up forms as internal only so that they can fill them out instead of the grantee.

Similar to the applicant and grantee experience, reviewers see applications assigned to them through a streamlined view of the system. What a reviewer sees is governed by role-level permissions. There are two review-focused roles in the system. Reviewer is the most locked-down view; users are only able to see items assigned to them. There is also a Board Member role, which allows users to see items assigned to them as well as the "Requests and Decisions" module so that they can look up organizations and see previous applications submitted and grants they received.
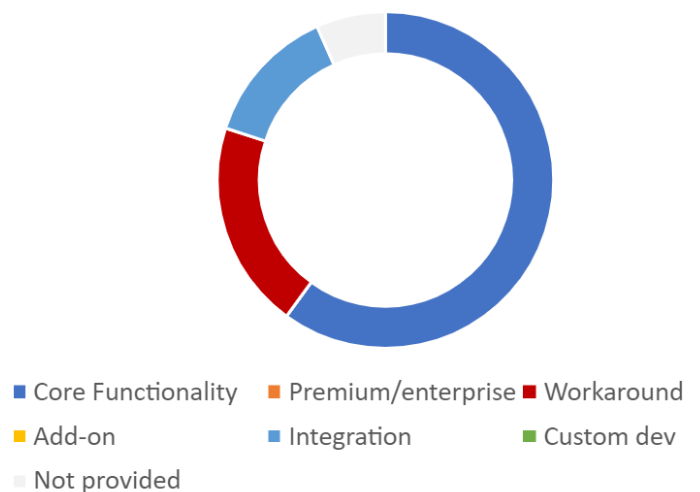
Reviewers see the applications assigned to them in a table view. They can customize that view by adding or removing columns and filtering the content. They can also download PDFs of applications assigned to them and

view any shared documents. A document viewer lets them view these in-system rather than having to download them.

Evaluation forms are displayed side-by-side with the application. You can have a variety of types of evaluation and scoring questions, including logic questions, which some foundations use to screen reviewers for conflicts of interest. Administrators can allow reviewers to see other reviewers' scoring on shared applications, if they wish.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system supports both organization and individual contact records. Users in the system can be associated with multiple organizations, and when you view their contact records you can see all the organizations with which they are associated. Similarly, when you look at a user's request history, you can see all the applications and grants associated with them. Organization records can also include items that are not a part of a grant process, like comments and documents.

There is an integration with the Candid GuideStar Charity Check. The integration includes a link to view the premier public profile on the Candid site, but you cannot bring any of the data back into the system. Similarly, you can view organization demographic data from Candid, but unless you have included

application questions that the constituent can populate from the Candid integration, you are not able to run reports on the data. This Candid integration is included in the subscription price for GLM and is free for up to 1,000 charity checks a year.

Emails sent through the system are saved on organization profiles and are accessible through a link to the organization email history on the profile. Emails sent outside the system need to be added to the profile as comments or documents.

As noted previously, there is a Board Member role in the system that provides for limited access to the system. Board Member users can see applications assigned to them, can look up organizations and their application and funding history, and can see items saved in shared documents like meeting agendas and board packets.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Once grant requests are approved, you can easily schedule payments. Foundations that use Foundant's CommunitySuite software can then send those payments through for processing. Foundations not using that software can use the payment tracking tool to view upcoming payments and export them to accounting. When they get the payment information back from accounting, they can enter it into a

template and then bulk import the template with the payment data back into the system. The vendor reports it is currently developing an integration with QuickBooks, which will be available later this year.

Budgets can be set by time period (fiscal year) and then by process (grant program). Budget drawdowns are tracked as grant payments are approved. You can use the system for basic reporting on budget allocations and payments but would need to use Community Suite for more advanced forecasting and payment processing.

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system comes with a simple predefined grant workflow with stages that the foundation can turn on and off for each grant program. There is no ability to define custom workflows in the system. You can set up automated emails for applications, reminders, and follow-ups. Emails can be scheduled to go out before, on, or after a specific date in the system. Batch actions can be used to move groups of records through the system or download items as a ZIP file, CSV or PDF.

Foundations on the advanced license can share datasets via API. The system includes a dataset builder that, when shared by the system's read-only API, can be used with business intelligence

tools or to display on the foundation's website. The system includes a pre-built integration with DocuSign that can be used with any document created in the system. An integration with Twilio SendGrid powers the system's email engine. It has an integration with Candid for its GuideStar Charity Check and also a connection to pull demographic data into applications.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided
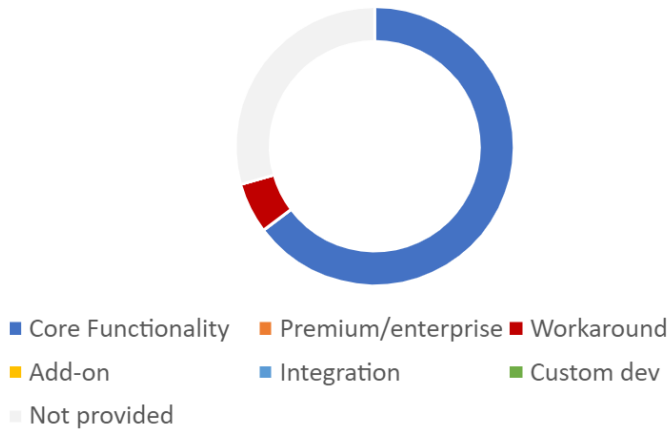
There is no global keyword search available, but you can do a full system search by organization name, project name, and project status, or you can perform five types of system searches: Requests and Decisions, Eligibility Center, Organizations, Users, and Candid. System searches take you to different "workload" pages where you can specify columns and filters to surface data from those types of records and do a quick search or filter of the content on that grid.
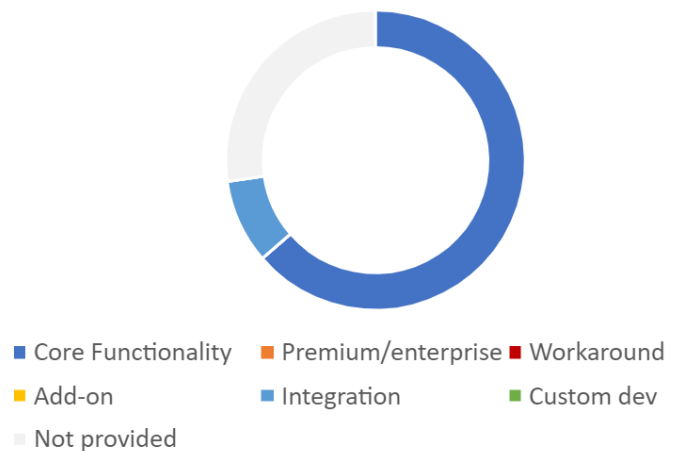
The system includes a metrics dashboard that provides charts of high-level metrics from different areas of the system. You can drill down into the charts to go to the corresponding workload page. The metrics dashboard is standard across all clients and is not customizable.

The dataset builder allows you to select data points that can be used in reports and exported in Excel format or shared via the API. The system comes with five standard datasets, and

you can build as many custom ones as you need. You can use the datasets in reports to create charts, build IF statements, or feed into formulas. Charts can include comparisons of different data. There are no canned reports in the system, but you can save any reports you create. You can't mark any reports as favorites, and reports can't be scheduled at this time, although the vendor notes that report scheduling is being developed and will be available in late 2024. Report permissions allow users to run and build reports or just run reports, but there is no way to restrict user access to specific reports if they have reporting permissions.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system is designed responsively to display across a variety of devices and the vendor says that the system is compliant with WCAG 2.1 accessibility guidelines. The system does not come with a pre-loaded taxonomy, but users can define their own custom codes and terms. GLM does not provide multi-currency support, but this is available through the vendor's CommunitySuite product. There is an integration with Google Translate, and the translate button appears on all pages of the site. The button will translate both the text and buttons on the page.

The vendor recently released the ability to generate summaries via AI. This includes summaries of application text, letters of intent,

and follow up forms. The summaries appear at the top in a clearly marked section and can be copied for use in other documents and emails.

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

There are six roles that govern what users can see and do in the system. These roles come prebuilt, and are not customizable with the exception of the grants manager role. You can make some limited customization to the grants manager to allow them access to certain processes and actions. This can be customized per-user within the grants manager role. The ability to customize the grants manager role is not available to users with a Basic license.

The vendor has made summaries of its security and privacy policies available online. Login security is protected by multi-factor authentication. The vendor notes that it is currently developing single sign-on functionality. An audit log tracks all changes made within the system. Data is encrypted both at rest and in transit.

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat	X		
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

Clients have access to unlimited phone and chat support. The vendor also provides access to a "success team" that provides more in-depth assistance, and access to this team is unlimited as well. Live support is available from 7 a.m. MT to 6 p.m. MT, and the turnaround time for assistance from the success team is generally one to two days.

The vendor also provides access to a knowledgebase and an extensive library of webinars and online training videos. Its Compass online community connects users not only on software-related questions, but also on larger philanthropic topics.

Implementation is priced separately from the yearly license fee, but that includes training and customer support from their assigned delivery team member.

Customer Experience Survey
Number of Survey Respondents Using The System: 38
Percent Who Would Recommend The System: 94.7
Training Rating: 3.60/4
Implementation Rating: 3.40/4
Support Score: 3.57/4

Foundation Cloud
https://npact.com/products/foundation-cloud/

Vendor: NPact
Year Released: 2011

Pricing
Foundation Cloud's pricing is calculated based on a customer foundation's assets under management, gift, and grantmaking activities. The yearly subscription cost provides access to both Foundation Cloud Grants (the grant management tool) and Foundation Cloud Community Portal (the portal for external users, including applicants, grantees, reviewers, and board members). It also includes access to the PowerBI integration, the Twilio SendGrid integration, and the Candid integration. You can't use Foundation Cloud by itself; it must integrate with a third-party CRM and financial accounting tool. The vendor has developed integrations with Blackbaud's Raiser's Edge NXT, Blackbaud CRM, Salesforce, and Virtuous CRM on the CRM side, and with Blackbaud's Financial Edge NXT and Sage Intacct on the financial accounting side. The vendor reports that it will be releasing an integration with Oracle NetSuite later in 2024. The vendor typically locks in pricing for a minimum of three years. Implementation costs are priced separately, depending on the complexity of business requirements.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $20,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $20,000-$50,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $50,000+

Overview
Foundation Cloud, formerly known as GrantsEdge NXT and Spectrum NXT, is a full-featured grants and application management solution primarily used by community foundations and asset-managing organizations. It also supports religious foundations and

arts councils. The system provides strong support for a variety of grantmaking programs, including organizational grants, individual grants, and scholarships.

Foundation Cloud is broken into two parts: Foundation Cloud Grants and Foundation Cloud Community Portal. Foundation Cloud Grants allows you to manage grants through their full lifecycle, including building applications, conducting due diligence, corresponding with applicants and grantees, and grant and impact reporting. Foundation Cloud Community Portal is the engine that drives the vendor's external facing portals for applicants, grantees, reviewers, board members, donors, and vendors.

The platform does not include native CRM or financial accounting tools. Instead, it leverages pre-built integrations with Blackbaud, Salesforce, and Virtuous CRM platforms and with Blackbaud and Sage Intacct finance tools.

Grants Management
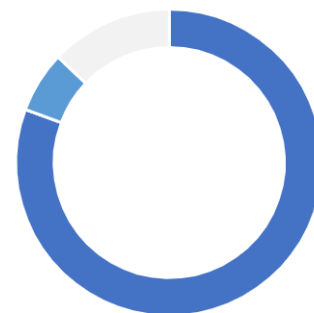
Grants Management Overview

Legend:
- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The core of Foundation Cloud Grants is the grant record, which follows grants as they move through each workflow stage. Grant applications submitted via the Foundation Cloud Community Portal come into the database as submitted proposals or scholarships, which are then reviewed; processed, reopened, or declined; and

turned into grants. Detailed constituent and organization information is viewable in the system, but most of that data is stored on a separate integrated CRM. The platform integrates with Candid and provides the basic GuideStar Charity Check functionality to all clients free of charge. The vendor reports that it is continuing to enhance the Candid integration and plans to roll out OFAC checks later in 2024.

The Foundation Cloud Community Portal is the external-facing site where the foundation can interact with applicants, grantees, reviewers, board members, and more. It can be branded with a foundation's logo, colors, fonts, headers, and footers. First-time visitors to the portal are presented with a registration page that asks them to select which role they would like to register for: grant applicant, scholarship applicant, board member. It also includes the ability to search for your organization or to create a new one if your organization is not present in the database. The system does not auto-populate organization data via EIN. Site admins can then review and approve the new registrations in the grants system.

Once logged in, the landing page displays the constituent's alerts, applications that the foundation wants to feature, applications that the constituent has recently accessed (with the current status of the application), grants that have been awarded to the constituent, and grant payments that have been made. It is possible for a site admin to create a report of upcoming payments using the system's reporting functionality and push that out to the constituent's portal.

Applications can be created for organizational grants, individual grants, or scholarships. You can build common scholarship applications that match applicants to a variety of scholarship funds. Application fields can include a multitude of data types, including conditional fields, calculated fields, reference requests, and file uploads. There is a size limit of 50MB for file uploads per field.

The system can prepopulate an application using the organizational information provided during portal registration, but does not have any integrations with centralized nonprofit data repositories. Two individuals from the same organization can work on an application, but the system does not facilitate collaboration between different organizations. Applicants can navigate through different pages of the application using the "Next" button or using the tabs at the top of the form. The system autosaves applicants' work and lets applicants print their full application, not including attachments.

Contextual help is provided throughout the portal. Help text is available out of the box, but you can edit or customize the text as needed. You can change the help text on an application and add icons to fields that will bring up your custom information. You can also create a query in Foundation Cloud Grants to calculate the amount of time between the time and date an application is created and the time and date it is submitted to get data on how long it takes applicants to complete an application.

Grantees can submit required reports using the portal. The reports are set up as supplemental pages to the grant application and appear on the same application record, which is attached to a grant in the system. You can then create or link a new grant record for the next installment or add another payment to the existing grant record.

External reviewers access applications assigned to them through the portal. Reviewers can be placed on committees or in review groups for ease of assignment. The dashboard that displays when they log in shows them the committees that they're on and the review groups of which they are a part. They can print the text of the application, but attachments need to be downloaded separately. Staff that access applications on Foundation Cloud Grants can download the application and the attachments. While reviewers can see

the applications they are assigned, they are not able to access additional organization information held in the grants system. When you create an application, you can specify which questions you want reviewers to score and which application pages they are able to see. Scores can be numeric or text-based and reviewers can also add comments to their reviews. Numeric scores are totaled; you can see your own total score and lead reviewers can see scores from other reviewers as well.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

In Foundation Cloud Grants, CRM functionality is achieved via integration. NPact has developed integrations with four popular CRM platforms: Blackbaud CRM, Blackbaud Raiser's Edge NXT, Salesforce, and Virtuous CRM. Detailed organization and individual constituent information is stored on the external CRM but can be displayed in-system. While the integration is two-way, so that you can update data in Foundation Cloud Grants and have it show up in the CRM, the vendor recommends that you make all updates in the CRM as a best practice. Syncs with the external CRM are frequent, and you can also trigger a manual sync when needed.

All relationship management is done through the integrated CRM, and all interactions should be logged within the CRM rather than in the grants system. Correspondence sent from Foundation Cloud Grants is logged on grant

records, but not on organization records in the system. You can build a variety of letter, document, and email templates in the system using a WYSIWYG editor, and these templates can pull in data from system fields. You can customize individual emails and letters and these customizations are saved to the grant record. Emails are sent via an integration with Twilio's SendGrid platform.

Board portal functionality is included as part of the Foundation Cloud Community Portal. Board members can log in to the portal and review, approve, or deny grants on an individual or docket level. You can also upload documents to the portal for board members, which helps you distribute agendas or meeting minutes. The vendor has a separate product, DonorCentral, to manage Donor Advised Fund programs.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

As with the CRM functionality, much of the financial management functionality is accomplished via integration with one of two systems: Blackbaud Financial Edge NXT and Sage Intacct. The vendor reports that it is working on an integration with Oracle NetSuite, which it anticipates being available later in 2024.

Foundation Cloud Grants does has some limited payment scheduling and tracking functionality. You can set up a default payment schedule for grants and customize the payment

as necessary, and you can set up contingent payments as well. Payments can be split between funds but can only be associated with one budget. You then batch payments in a check run, which is sent over to finance. Check runs can be set up to run as an overnight sync, and then you are notified of any errors. Once the batch is run, the payment status is automatically updated on associated records. There's no limit on how many payments you can send over to finance.

You can set up budgets in the system and track drawdowns. While there is no formal forecasting functionality in the system, the vendor reports that you can create "what if" scenarios with a custom report. The vendor does have a fund investment tool available as a separate product.

Automation and Integration

Automation & Integration Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided
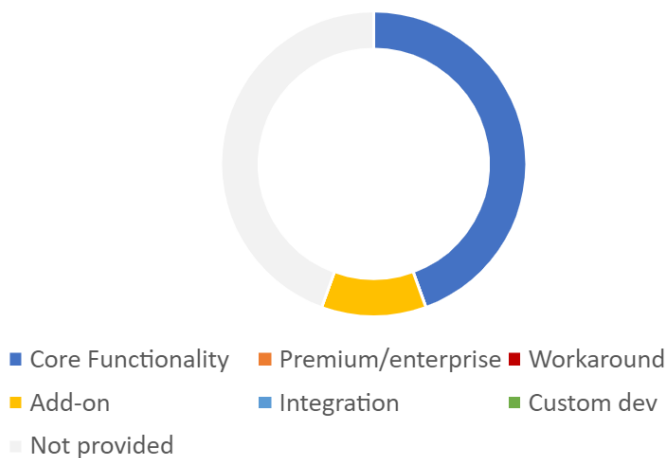
You can build a variety of custom workflow templates in the system to meet the needs of different grant processes. Notifications for tasks and application confirmations are sent via automated emails. Numerous batch processes can be run in the system, including batch check runs, batch correspondence, batch dockets, and batch proposals.

The vendor reports that it does not have any private APIs but has released a beta public API and plans to release further enhancements in the near future. As noted previously, it

has pre-built integrations with four popular CRM platforms and two finance/accounting platforms, with a third accounting integration in development. It also has a basic Candid GuideStar Charity Check integration, a Twilio SendGrid integration, a Fiserv integration, and an integration with Microsoft PowerBI that is the basis for reporting and dashboard functionality.

Business Intelligence and Reporting Dashboards in the system are created via an in-system integration with Microsoft PowerBI and are accessed via the Reporting section of the menu. The system comes with one out-of-the-box PowerBI dashboard and one impact tab with geographic heat map, as well as the ability to create your own personalized PowerBI dashboards. Each section of Foundation Cloud Grants has a couple of overview charts at the top of the page, with a table of records underneath that you can sort and filter. A global search is available but it does not search the content of attachments.

The system includes a variety of out-of-the-box queries that allow you to sort and filter the data and that you can export as .CSV files. It also offers more than 50 paginated reports out-of-the-box. You can make changes to any of these pre-built reports and save them as new reports, but you are not able to mark any as favorites or schedule them to be run at a future time. You can create your own custom queries based on any fields in the system. Progress toward outcome goals can be calculated with custom reports, provided you are collecting that data in the system.

You can create a large variety of data visualizations within the system via the PowerBI integration. These visualizations allow you to click through to underlying data if you created the report. You can export these PowerBI charts and visualizations in a variety of formats.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system is designed responsively to display across a variety of devices. The vendor reports that it is in partial compliance with WCAG accessibility guidelines. There is no default taxonomy available out-of-the-box, but the vendor says it usually pulls in the taxonomy used in the integrated CRM platform to ensure that data is consistent across systems. However, it can also set up a custom taxonomy if the client wishes. It is also possible to import grants into the system via .CSV.

The donor portal is available in English and French, and the language can be changed by administrators in the settings tab of the portal. More extensive multilingual capabilities and online translation integration require custom development. You can select either U.S. or Canadian dollars as your standard currency for grants, but multi-currency grant functionality is not available.

Security and Privacy

Security & Privacy Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Role-based security determines what individuals can see or do in the system. The software comes with a limited number of preset roles, but you can customize those roles and add new ones as needed. The PowerBI dashboards are displayed through a separate set of permissions. Multi-factor authentication is available to enforce login security, but there is no single sign-on capability. Data is encrypted both in transit and at rest. The system logs whenever someone takes an action or makes a transaction for audit purposes. The vendor's privacy policy is available on their website and they provide their security, SLA, and disaster recovery policies to potential and existing customers upon request.

Training and Support

	Included	Additional Cost	Not Available
Phone			X
Chat			X
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

Clients have access to a knowledgebase, email support, and a user community. The vendor does not provide support to applicants, reviewers, or board members who use the portal, but the foundation does have the ability to create and update custom help text throughout the portal. Integration is priced separately from the yearly subscription cost, based on the complexity of the client's needs. New users can access training videos and the vendor provides frequent training webinars for all users.

Customer Experience Survey
Number Of Survey Respondents Using The System: 0

Impactfully by Foundation Source
https://foundationsource.com/impactfully/

Vendor: Foundation Source
Year Released: 2023

Pricing
Pricing is based on a combination of flat fees and services. The vendor offers four packages that range from the Independent package—which is fully managed by your foundation—to the Inclusive package, which includes Foundation Source administrative services and automated reporting feeds from your financial institution. The online applications and outcomes module is included with the Independent and Essential packages but is an add-on at an additional cost for the Collaboration and Inclusive packages. Implementation is priced separately from the yearly subscription fee and ranges from free to $10,000.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $10,000-$24,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $10,000-$88,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $10,000-$120,000

Overview
Foundation Source is a foundation management and services company that works with family, corporate, and professionally staffed foundations. Its Impactfully platform is the newest iteration of the Foundation Source Online technology product that served as the backend platform used by Foundation Source's services team and a frontend portal for its clients. The latest version of the software gives clients access to the full capabilities of the platform and provides grants management and expense management functionality paired with a proprietary database of nonprofits that brings together IRS data and their own staff research to provide a comprehensive listing of nonprofit profiles.

This database means that organization records are handled slightly differently than in other systems. Rather than creating organization records, applications and grants are instead appended to existing organization records in the database. Organizations not in the database go through a certification process by Foundation Source staff before being entered.

The software provides some additional features around granting, including an approach that facilitates discretionary grants made by board members and staff members. Because Foundation Source is also a professional services company, it can also execute grant and expense payments, including conducting due diligence, compliance verification, monitoring for fraud, and distributing award notification letters.

Grants Management

Grants Management Overview

■ Core Functionality ■ Premium/enterprise ■ Workaround
■ Add-on ■ Integration ■ Custom dev
■ Not provided

Grant records in the system can either be based on application records that have been approved for grants or as standalone grants without an accompanying application history. They are connected to an organization record in the database and include related attachments, interactions, contacts, notes, grant payments, and any outcomes collected through grantee reporting. There are also a variety of custom fields at the bottom of the record that are configurable to collect many different types of information. The custom

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fields can pull data from forms that you want to show on the record, like demographic data. Custom fields are also used for internal users to fill out as part of the workflow. The database is automatically updated when the IRS releases business master file updates. This is in addition to the database manual compliance checks conducted by Foundation Source staff on charities not in the IRS database. OFAC compliance checks are automatically run prior to grant and expense payments.

The ability to collect online applications is included in some packages and sold as an add-on for others. The system provides a wizard that walks you through the steps of creating an application, including putting together a customizable welcome page that can be branded with your logo, an eligibility quiz that can branch to multiple forms if needed, and the application form itself. Application forms can contain a variety of field types but are not able to accommodate questions with branching logic. The system permits file attachments up to 100MB, but the foundation can set limits on the max file size for uploads; there are no limits on the number of file uploads or on the amount of file storage. Foundations can duplicate or clone past applications to create new ones, but applicants cannot. Foundations can share links to applications publicly or invite nonprofits to apply privately. Applications can be used for both organizational and individual grants.

You can separate applications into sections with navigation tabs on the side of the form. Information entered by the applicant autosaves as they move between fields, and a "save draft" button allows them to save their work and receive an email with a direct link to the application as well as a PDF copy of what they have filled out thus far. At this time, you cannot prepopulate application fields with information from the registration process or the database, but the vendor says that this is on the roadmap for later this year. Foundation users can go into the application and fill it out on behalf of a charity.

GivingHub, the Foundation Source applicant and grantee portal, included in the Independent and Essentials packages and available as an add-on purchase for the Collaboration and Inclusive packages. The portal isn't specific to the foundation, but instead includes any of the user's applications and grants from any foundation that uses Impactfully. As such, it is branded as GivingHub by Foundation Source and does not include foundation branding. Users can see applications they've been invited to complete, those that are in progress, and any that have been submitted, as well as grants that have been approved along with payment information. They can also submit and see outcomes reports.

Applicants can create a profile in GivingHub and associate that profile with a nonprofit from Foundation Source's database. If their organization is not listed in the database, they can create a new record and submit an application but the application would show up as on hold until it's vetted by Foundation Source's research team. Applicants can invite others to collaborate on applications . These collaborators can be in their organizations or from other organizations. However, there is no way to limit their ability to see other applications or grants in the applicant's account.

Reviewers can access the applications assigned to them directly through the Impactfully platform; there is no external reviewer portal. Permissions limit what they are able to see in the platform. You can assign applications to reviewers individually or to a committee composed of multiple reviewers. You can have a variety of different scoring schemes for applications, with numeric scores, radio buttons, dropdown lists, and text entry and you can use the reporting tools in the system to see a summary of review scores.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Organization records already exist in the system within the database of nonprofits curated by Foundation Source. The vendor receives a monthly feed of data from the IRS business master file, and also has a charity research team that looks into nonprofits not in the IRS file or whose records are on hold. Verified nonprofits are tagged with an icon. Each organization record also has a link to the nonprofit's page on Candid's GuideStar. The links pop open to the organization's page on the Candid website, and the information on the GuideStar profile has to manually be added to the system. Individual contact records can be created and associated with the organization records. You can also mark organization records as favorites so that they show up at the top of search results.

The system supports emails and letters that can be created using a WYSIWYG editor, as well as custom templates. These templates can pull in information from the system and can be customized before sending. You can send emails to individuals but the ability to send bulk emails requires the Applications and Outcomes module; bulk email sends do not include data about opens or clicks. All emails sent through the system are saved to the grant application or organization record. Emails sent outside the system have to be entered as a note.

The system includes a document library that allows users to create folders and add files for other users to access. This is where foundations can save board meeting documents and determination letters. There is no board portal functionality but you can create accounts for board members to log in and view dashboards and documents or review and vote on grants.

Financial Management

Financial Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system includes flexible payment functionality. A grant wizard in the system walks you through setting up payments and associating those payments with budgets in the system. You can set up default payment schedules for grants and you can also change individual payment dates and budgets as needed. These payments can be multi-year as well. A subscription package includes the option of letting the vendor take care of check disbursements for you, and the vendor reports that it is currently working on the ability to make digital payments via PayPal as well.

Budgets are created in their impact plan functionality. When you create an impact plan, you associate a budget with it and you can use the impact plan tool as a dashboard to view budget drawdowns and a list of individual grants related to that budget that you can click into. The system will also notify you if a planned payment will exceed the budget set up in the system. "What if" functionality and forecasting can be done by running reports

on future grants. The system does not include an accounting tool, but a pre-built integration allows you to export files to QuickBooks.

Automation and Integration
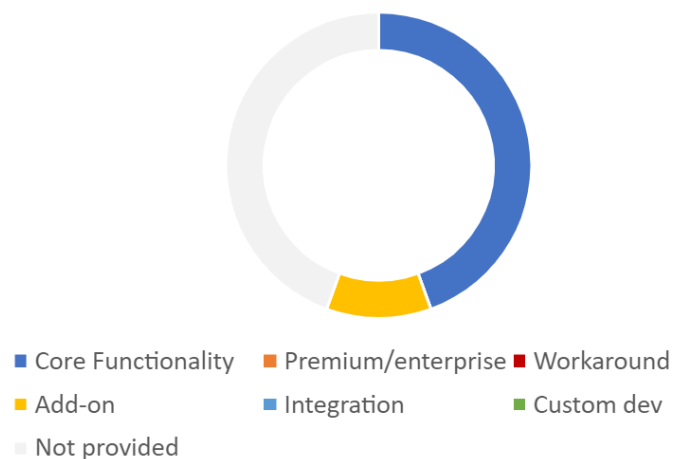
Automation & Integration Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
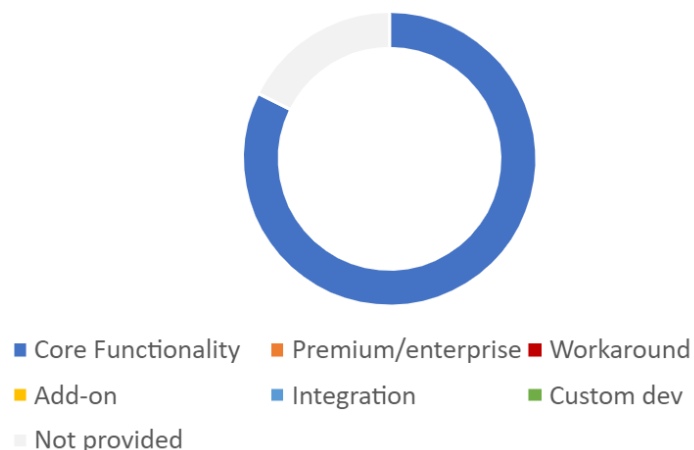- ■ Custom dev
- ■ Not provided

Workflows in the system are focused on the application and review process. Submitted applications have a status of "under review," and there are four preset system statuses: voting required, voting complete, enter grant, and decline application. You can also use tags to highlight or hide fields from reviewers and other users to control who sees certain information at different steps in the workflow process. Custom grant and expense approval flows that provide financial controls are also available.

The system allows for automated emails for reminders and confirmations. You can perform batch updates on groups of records for certain actions. The vendor can provide a template for new clients to upload grant history, but other batch updates via file upload require an additional services agreement. There is a public REST API that exposes some endpoints publicly so any browser can call them. Pre-existing integrations allow you to export records to QuickBooks and access nonprofit profiles on Candid GuideStar.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The search bar at the top of the welcome page in the system has two tabs: one allows you to search for organization records and the other for grant records. The organization search prioritizes your favorites and results with which you have had previous interactions. You can get matches from partial word searches, but it is not a fuzzy search.

Dashboards contain shortcut tiles that display a user's frequently accessed actions. Users can customize their dashboards by organizing or adding tiles. Tiles include personal and foundationtask lists, quick report charts, and automated tracking of the foundation's remaining annual 5 percent minimum distribution requirement. The tiles a user can view are governed by system permissions. Administrators can customize dashboard views for other users, such as external reviewers and board members.

The system includes 38 prepackaged reports. These standard reports can be edited and saved as custom reports. You can mark reports as favorites. The system also allows you to create a variety of ad hoc reports. Reports can be exported in a variety of formats. You can also schedule reports to run at specific times and these can be emailed to users. Outcome reports can be created based on data collected from grantees; outcome report requests are associated with payments. You also can

create outcomes on behalf of grantees so that the foundation can submit the necessary information.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system has some responsive design features, and the vendor also offers a mobile app for optimized display on non-desktop devices. The app lets you perform nearly all actions in the system except for configuration. The system is not WCAG 2.1 compliant, but the vendor reports that it is working on accessibility features. There is no pre-loaded common taxonomy in the system, but clients can define their own tags and categories in the system. Grants and payments can be tagged with an impact plan or a report code, which allows for categorization and reporting. The system does not provide multi-currency or multilingual support.

New clients can use the system's tool to import their grant history. The vendor provides a CSV template that foundations can use with their past grant data. When you upload the spreadsheet into the system, it will guide you through a wizard that helps you match the grant to charity records in the database and prompts you for any data that needs to be clarified or fixed.

Security and Privacy
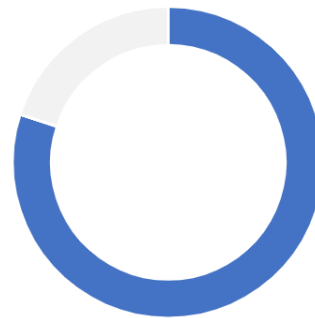
Security & Privacy Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

Login security is protected by multi-factor authentication. There is no single sign-on ability but this is on the vendor roadmap. Granular permissions govern what individuals can see and do in the system. Data is encrypted at rest and in transit, and the vendor reports the platform is SOC2 compliant. An audit log records all system actions. The vendor provides links to security and privacy policies to clients, but they are located behind a login page.

Training and Support

	Included	Additional Cost	Not Available
Phone		X	
Chat			X
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community			X
Implementation		X	

The vendor provides phone and email support to clients, either by appointment or 9 a.m. to 5 p.m. in their respective time zones. Email support is free for all clients, and phone support comes with all packages except Independent. There are also a variety of in-system help and tool tips available and marked by icons—a triangle with an exclamation point or a small "i"—that users can hover over for explanations or pointers. There are also help videos that pop up for some functions, and sections for users to provide feedback. The vendor releases updates every two weeks. Technical support is also available for applicants using the Foundation Source GivingHub applicant portal, with a link to a help page at the bottom of the screen where people can search for help topics or submit a request for support.

The vendor's Resource Hub includes a variety of articles, videos, webinars, demos, and more that you can search and filter by topic, user role, or resource type. There is no online user community. System implementation is priced separately from the yearly subscription fee and the vendor provides unlimited and complimentary technical training. The vendor has a Philanthropic Advisory group that can additionally provide small group and customized training for a fee.

Customer Experience Survey
Number Of Survey Respondents Using The System: 0

Giving Data
GivingData.com

Vendor: GivingData, LLC
Year Released: 2016

Pricing
Yearly subscription pricing for the system is broken into three tiers: Go, Pro, and Enterprise. The Go level provides a full set of tools for simple grants management. Pro subscriptions add on features such as workflows, branching logic, scenario planning, and multi-currency support. Enterprise subscriptions are for clients with more advanced requirements or that need custom integrations. While the vendor did not provide specific sample pricing, it did note that yearly subscription costs range from $9,000 to more than $50,000.

GivingData offers three implementation packages depending on the complexity of the implementation and data and/or document migration. Costs range from $6,600 to more than $25,000. The vendor has also developed a partnership program with several technology consultants who can assist clients with implementations and strategic services.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $9,000-$25,000+
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $20,000-$50,000+
- **Large Foundation (> $500 million in grants, 50+ staff):** $50,000+

Overview
GivingData is a solid, user-friendly system with a clean interface, good relationship management functionality, and several features that facilitate trust-based philanthropy. Data from the system can be surfaced in grant applications to help minimize the amount of data entry required from applicants. In addition, such features as the ability to exchange and update documents with grantees, interactions that are displayed across related records and

appear along a timeline, and an exploration feature to help with budget planning combine to help foundation staff conduct relationship-centric and collaborative giving.

The system's "Super Docs" format provides the ability to update data within the system when a document is updated, while its "Super Search" lets you create and manipulate complex searches within the system. Recent updates have strengthened external reviewer abilities and added an in-system cloud-based document management option for foundations that do not have subscriptions to tools like OneDrive or Box.

Grants Management
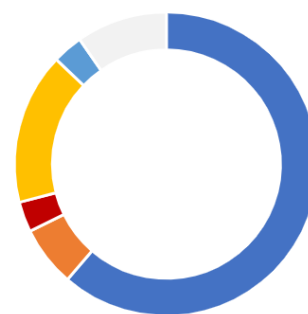
Grants Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system provides solid grants management and tracking capability throughout the grant lifecycle, from application through progress reporting and close-out. It now has a republishing function for progress reporting that allows the foundation and grantee to exchange and update the same document over time, with the ability to enable version control on each upload.

There is a grantee portal, which is a separate database where applicants can complete online applications and can track their application status, requirement due dates, payment status. Grantees also upload progress reports to the portal. It is possible for new applicants to the foundation to create an account in the portal,

but this functionality is an add-on at an extra cost for subscribers at the Go level.

The portal is a SQL database that talks to the foundation's master GivingData SQL database, so it has ability to display and use data from the master database in applications. That means that organizations that already have records in the system can prefill their applications with existing data. For each application, you can determine how the system handles changes to system data when the application is imported into the master GivingData database: prompt to review the change, overwrite the system data, don't overwrite the system data, or import all content where fields are empty. You can also allow returning applicants to see answers they provided previously for application fields mapped to the database, and let them reuse those answers for new applications.

Applications can be invitation-only or open to all. You can add images to applications and use rich text formatting on questions. They can also contain a variety of question types. Pro and Enterprise package subscribers can include questions with branching logic. The vendor has a Demographics via Candid integration that allows you to auto-populate demographic information from an organization's Candid profile into an application; if the applicant wants to update or change any of the information, a link in the application will send them to Candid to make those changes, which are then reflected back in the application.
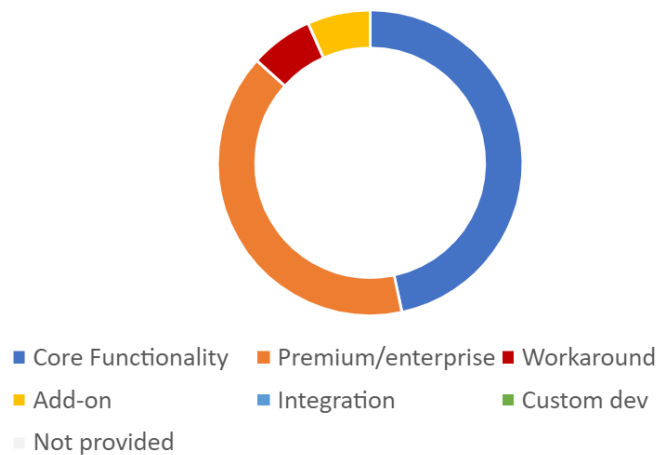
You can specify the types of file attachments that applicants can upload to the system. There is a 20MB size limit per file, but the vendor reports that it has increased that limit for several clients for an additional fee. There are no overall storage limits for the foundation. The vendor has also released a budget template tool that allows you to collect budget line items that can be imported directly into database fields; the tool does not automatically calculate subtotals or totals. The vendor has also created two types of general intake forms that can live

on the grantee portal. One can be associated with a particular grant and allows a grantee to submit an amendment request, and one allows a grantee to update their organization information.

An external reviewer module is available as an add-on at an extra cost. External review assignments and reviews are done using the grantee portal database. When reviewers log in, they will see a list of the reviews assigned to them. The vendor recently released an update to the portal that allows reviewers to see the application and review form side-by-side. You can solicit a variety of types of reviews, from numerical scoring and ranking evaluations to comments, and see all the reviews in the portal once they are completed. The vendor reports that it is adding the ability to define multiple rating scales with weighted scores and simplify the assignment of reviewers based on a reviewer's area of expertise.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

GivingData includes a variety of CRM capabilities that confer benefits both to the foundation and to grantees. The system has both individual contact and organization records, with the ability to specify relationships between records. Individuals can be associated with more than one organization, which allows grant writers to use one set of login credentials to work on several different organizations,

and also allows the foundation to track board members and other individuals affiliated with multiple nonprofits.

Organization profiles can be verified against government nonprofit/charity databases in the U.S., England, Wales, and Australia. They can include charts and tables of demographic information from the vendor's free Demographics via Candid integration, and foundations can also add information on the demographics of populations served by the nonprofit via custom fields.

Interactions are stored as separate objects in the database, and can be linked to individual contact records, organization records, and grant records. They display as icons along a timeline within each record as well as in tabular format below the timeline. Customers with Pro and Enterprise subscriptions can take advantage of integrations with Outlook and Gmail to easily capture messages sent outside the system into contact, organization, and grant records. These interaction records will also include any attachments, and any replies to the message thread will automatically be recorded in GivingData as well.

The system supports both email and letter templates. Letter templates are available to all clients, as are automated emails, such as reminder emails. Pro and Enterprise subscribers also have the ability to create templates for other types of emails and can view open and clickthrough data for bulk emails sent through the system. Letter templates can include fields that display content held in the database, and files saved in the system's "Super Docs" format let you insert merge fields in a document that will update in the system when changes are made in the document.

GivingData provides several options for document management. You can integrate with OneDrive, Google Drive, and Box; these integrations can coexist if you have accounts with more than one cloud storage account.

The vendor also recently released a native document management solution called GD Cloud that leverages the storage in SQL. You can open documents stored in GD Cloud in your browser, edit them with collaborative editing functionality, and save the new version, all without having to download or upload any files.

The vendor reports that board portal functionality is possible through an add-on to the system that is available at an extra cost.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
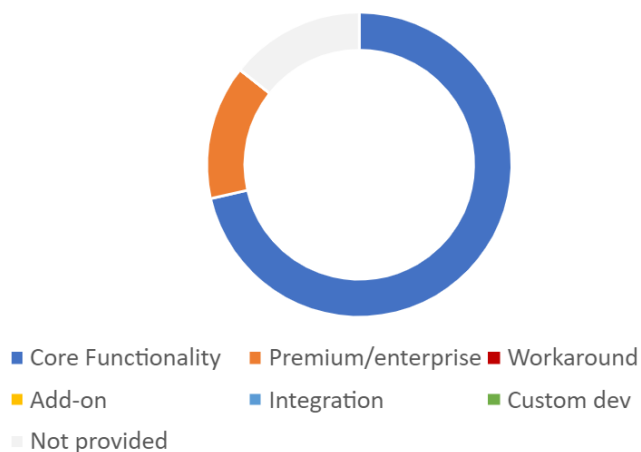
The system allows you to track grant payments. There is no ability to set up default payment schedules for grants; they are set up individually when a grant is approved. Payments can be made contingent on the completion of specified requirements.

You can set up program budgets and track drawdowns when grants are paid. A view by code allocation allows foundations to track things both by total dollar amounts and by percentage allocation of the budget in a specific area. The scenario planning tool by default shows two years of budgets, but can be adjusted to show budgets for as many fiscal years as are configured in the system. This flexibility aids in planning multi-year grants. You can also see upcoming renewals when you are in planning mode—the system surfaces grants that are within the notification window, and you
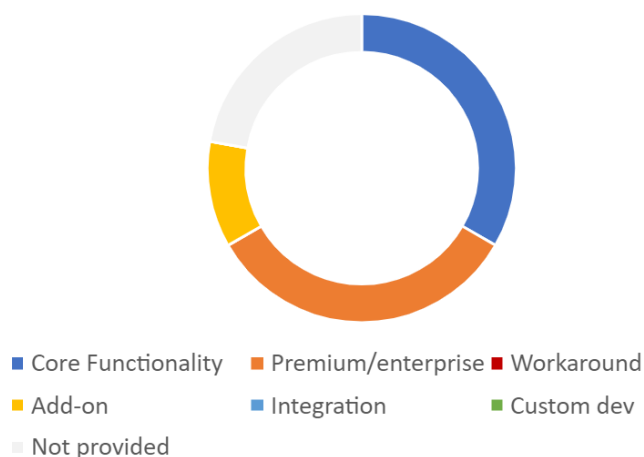
can easily click on them to create a renewal record and add it to your pipeline.

The vendor recently released an exploration feature to help foundations build out ideas without impacting the budget. Ideas with an exploring status appear at the top of the budget planning tool as they are being built out, and then can be moved directly into the budget when they are ready to move forward.

The system does not include any accounting integration, but the vendor reports it will be releasing an integration with BILL later this year in conjunction with open financial data APIs that can be used by clients to develop integrations with multiple accounting systems.

Automation and Integration

Automation and Integration Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
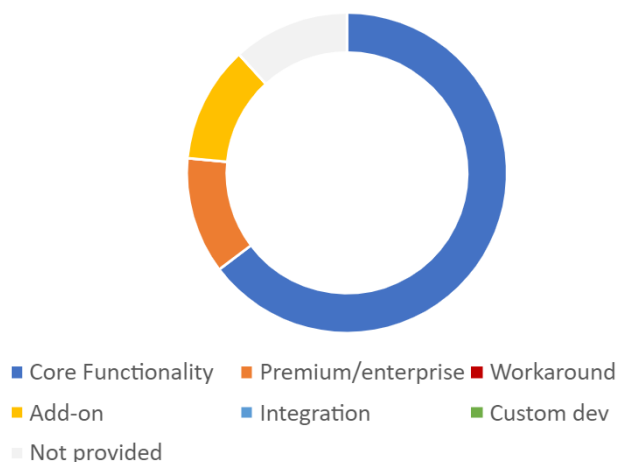- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system allows you to create different types of workflows that align with your foundation's processes, and has different types of automations based on the type of workflow. Pro and Enterprise subscribers have the ability to create multiple custom workflows. The vendor reports that it is developing a workflow enhancement that would allow you to add workflows based on a variety of triggers. Automated emails can be set up for application submissions, renewal reminders, report due dates, and more.

There are 10 pre-built integrations in the system, including Gmail and Outlook, Demographics via Candid, OneDrive, Box, DocuSign, Adobe Sign, Eligibility Verification for UK-Registered Charities in England and Wales, Australian Business Register ACNC, and OFAC.

GivingData offers both public and private APIs for Pro and Enterprise subscribers. This includes its CRM APIs and its web publishing APIs. Later this year, the vendor reports that it will be releasing open financial data APIs to allow clients to develop integrations with accounting systems. Documentation for the APIs can be found in the vendor's knowledgebase. As mentioned earlier, the vendor also reports that it is working on an integration with BILL that will be released in late 2024.

Business Intelligence and Reporting

Business Intelligence and Reporting Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The navigation across the top of the system provides access to a quick keyword search of organization, grant, and contact records. There is also a "Super Search" that provides more advanced functionality, including the ability to edit and reorder columns and column labels, to group fields, and to save the search as public or private. Users are able to do batch operations from Super Search results and export search results to Excel. There is also now the ability to view Super Search results in a list view or as a line graph or bar chart to show comparisons
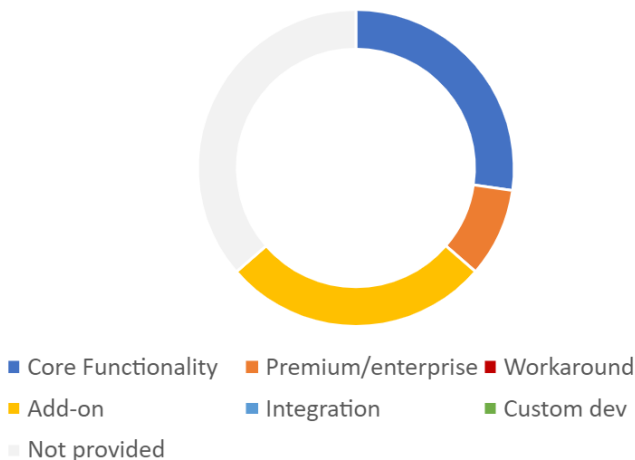
or trends. These charts can be exported as an image or you can export the underlying data in Excel or CSV format.

The home page that is displayed when you log in to GivingData is configurable. The system comes with four widgets that display task assignments, recently viewed records, and recently run reports. In addition to the home page widgets, users can build out custom dashboards in each area of the system, including for application intake, payments, approvals, and grant reports/requirements. Dashboards can be private or public—you can click through charts in the dashboards to see the underlying records, but this feature is not available for charts created in the search module.

The system comes with nine pre-built reports. Out-of-the-box reports are configurable by the user, who can save the customized report. Pro and Enterprise subscribers can also create ad hoc reports that can be exported to Excel and in PDF format. You can categorize and favorite your reports and Pro and Enterprise subscribers have the ability to schedule reports to run at certain times or intervals. Outcomes reporting is possible with an additional module that is available at an extra cost.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The system is designed responsively for display across a variety of devices. The vendor reports that it is working toward WCAG 2.1 compliance and has a report from a third-party with a full set of recommendations for increasing accessibility for users of the system. Clients are able to upload their own taxonomies to use in the system; it does not come with a pre-existing taxonomy.

Multi-currency support is available to Pro and Enterprise subscribers. The vendor reports that all content in the system can be multilingual, but there are not any online translation add-ons available. For an additional fee, GivingData offers dedicated services for bulk data import. The cost varies based on the project's scope. The vendor is currently exploring ways to integrate AI tools into existing functionality and has developed a prototype that uses AI to summarize interactions in the system and perform sentiment analysis on interactions; it has not as of yet been released to customers.

Security and Privacy

Security and Privacy Considerations

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided
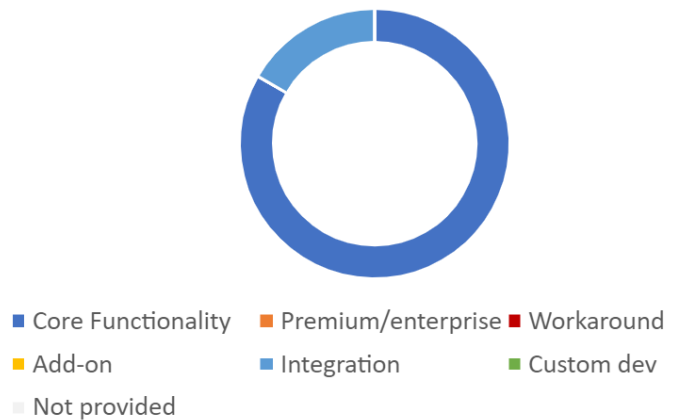
GivingData's Trust Center provides information about security policies, privacy policies, and compliance Standards. The vendor also provides SLA and disaster recovery policies to potential clients who sign a nondisclosure agreement.

Login security can be protected by multifactor authentication and/or single sign-on via integrations with Okta, OneLogin, Microsoft, and Google. System administrators have a granular ability to grant or restrict user access to a wide variety of system functions. An audit log provides a record of all changes made in the system. System data is encrypted both at rest and in transit.

Training and Support

	Included	Additional Cost	Not Available
Phone			X
Chat			X
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

There are three branches in GivingData's customer support team: implementation consultants, client success managers, and the helpdesk. The implementation consultants hand clients off to a dedicated client success manager (CSM) once the system is up and running. After implementation, clients meets monthly with their CSM for a three-month period and then transition to quarterly meetings. All support requests to the helpdesk are made via a ticket submission tool that is integrated in the platform.

A knowledgebase is integrated with GivingData's online user community and includes training videos updated on a regular basis.

Customer Experience Survey
Number of Survey Respondents Using the System: 37
Percent Who Would Recommend the System: 97.3
Training Rating: 3.51/4
Implementation Rating: 3.53/4
Support Score: 3.46/4

NextZen
www.wizehive.com/nextzen

Vendor: WizeHive
Year Released: 2023

Pricing
The vendor offers three tiers of pricing: Core, Premium, and Enterprise. Core supports basic application decision-making processes but does not include reporting or any financial management capability. Premium provides full grant lifecycle management functionality, including standard reporting and some financial management tools. Enterprise is full-featured, including advanced reporting. Some Enterprise modules, like advanced reporting and integration, can be added on to lower tiers at an additional cost.

In addition to the yearly fees, the vendor also offers the ability to do disbursements on behalf of clients for a processing fee based on grant volume. Implementation costs are separate from yearly subscription fees and are scoped on a client-by-client basis.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $7,500+
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $12,500+
- **Large Foundation (> $500 million in grants, 50+ staff):** $22,500+

Overview
NextZen is a new platform from WizeHive that was purpose-built for grants and scholarships. It is the successor to the vendor's Zengine platform, which is still available and supported. The core of the system, which is quick to set up and deploy, is a robust online application module that includes easy collaboration tools, request functionality, and the ability to collect a variety of data in tables. These tables can be used to capture and track specific types of data, including budget line items and goals and outputs.

Subscribers to the Premium and Enterprise packages get additional grants management modules, including financial management capabilities and post-award functions like progress reporting and requirements tracking. Enterprise customers also get access to advanced reporting, which is also available to Premium customers as an add-on. It includes a third-party business intelligence tool that has been integrated into the system and provides sophisticated dashboards, charts, and visualizations.

Grants Management

Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system is purpose-built for grant and scholarship management, from applications through post-award activities. However, not all modules and functions are available to Core subscribers—for example, progress reporting and requirements tracking are only available to Premium and Enterprise subscribers.

All subscribers get access to a robust application tool. Each program the foundation manages can have its own branding and its own landing page for applicants and grantees. You have the ability to add an eligibility quiz that applicants can complete prior to logging in to work on the application to determine if they are a fit for a particular program. The system also allows new users to preview an application before creating an account.

There is not a separate grantee portal; applicants and grantees log into the system and have restricted views and actions governed by system permissions. New users can create a profile in the system and prefill the organization information with data from Candid's GuideStar. If an organization already has a profile in the system, an applicant can search by EIN or name to add that information to an application. Individuals associated with multiple organizations in the system can use the same login credentials and pick the profile they want to work on for that session.

Once they are logged in, applicants and grantees can manage their profiles; manage their applications; view previous applications; see the reporting schedule for their current grants, and view the approved budget and budgetary requirements for their grants, as well as any goals and outcomes they have defined. Additionally, grantees can submit both expenses and reimbursement requests against their grant budgets.

Applications can include a wide range of field types. In addition to standard data fields, you can also capture information through a variety of tables in applications. One is a generic table that allows you to mimic Excel and supports a variety of different formulas. You can also add in purpose-built budget tables that allow applicants to enter line items that are tracked throughout the lifecycle and that can be used for invoices and reimbursements post-award. Another type of table allows you to track and measure goals and outputs, as well as milestones.
There are no restrictions on file types that can be uploaded to the system or the number of files that can be attached to an application, and files up to 1GB can be uploaded.

A request tool allows applicants to ask individuals for any supporting documentation needed for their applications, such as uploading a letter of support or filling out a survey. The system sends an email to that third party, which directs them to a specific page where they can fulfill the request.

The system auto-saves data entered into applications. Applicants can download the full application ahead of time.

A collaboration tool allows applicants to easily invite others to collaborate on an application. Collaborators can fill out application fields and upload files but cannot do the final submission. These collaborations can continue throughout the grant lifecycle, including post-award reporting. Collaborators do not need to be a member of the same organization.

A revisions tool allows the administrator to unlock individual fields after an application is submitted and request a revision from the applicant. The applicant will receive an email and can log into the system to review the comments from the funder, update the application, and resubmit.

External reviewers log in to the same system as administrators and applicants, with their views of system data controlled by role-based permissions. External reviewers only see the applications assigned to them on their dashboards when they log in, along with program information. However, reviewers can be assigned additional system privileges if they have multiple roles with the foundation.

The system supports a variety of scoring schemes, including Likert scales, numeric sliders, voting, and ratings. Scores can be weighted. You can include the applicant history from the organization profile with the application if you want external reviewers to have access to it. You can also specify on a line-by-line basis how much detail you want reviewers to see on the application. For multi-round reviews, you can allow the reviewers in the later rounds to see all the reviews that have happened beforehand along with their scores.

Reviewers can download applications, which includes any supporting materials that have been attached with it as well. They can look at attachments uploaded to applications in the system and play audio and video in-system.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
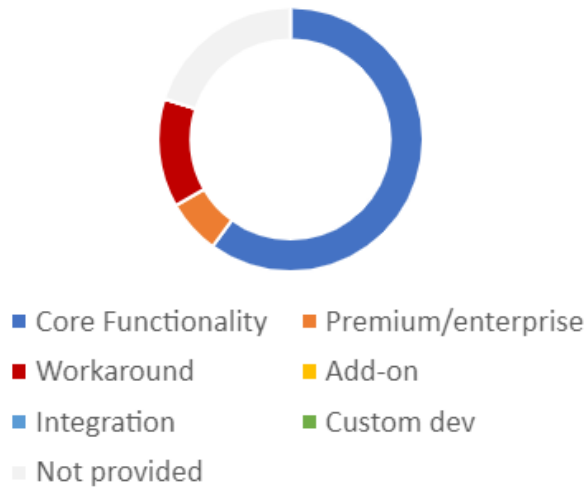
The system supports profiles for both individuals and organizations. Organization records include profile data, previous grants and applications they've submitted, and notes. Organizations can be checked against Candid GuideStar Charity Check, IRS data, OFAC, FBI watch lists, and Interpol.

Organization contacts don't have to be employees of the organization, although the system does not allow you to specify relationship types or differentiate between employees and non-employees, and contacts can be associated with more than one organization. Organizations can have a profile owner who is allowed to invite additional people to work on applications and reports for the organization and who can update organization information.
You can send emails to indiv
iduals as well as bulk emails through the system. You can set up email templates, and automated emails can be set up for date-based distribution or triggered by actions. System emails are not logged on the organization

record but are accessible through the audit history. You can also add interactions to the profile using notes.

The system supports document creation, including email and letter templates that can include custom content from system fields. The vendor reports that clients can use the reviewer functionality of the system to serve as a board portal.

The system has drag-and-drop two-way integrations with more than 20 CRMs via a built-in connection with a third-party iPaaS tool. The vendor is also developing integrations with Office 365 and Google Workspace. Integrations require a Premium or Enterprise subscription.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
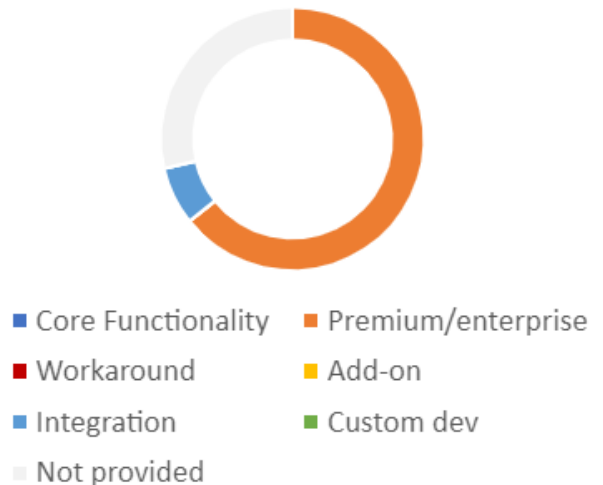
Financial management functionality is not available for Core subscribers. Premium and Enterprise subscribers have the ability to manage payments and budgets. You can set up a default schedule for grant payments on a program-by-program basis and customize payments when needed. Enterprise subscribers can set up dashboards for grantees to be able to see their project budgets and remaining funds. They can submit expenses as well as submit for reimbursements. The vendor also can disburse funds on behalf of the grantor via

check or electronic payment.

Premium and Enterprise subscribers can set up budgets in the system, track payments against budgets, and report on budgets. The system does not provide forecasting or PRI interest payment tracking. The vendor offers integrations with a large number of financial management platforms—including NetSuite, Sage Intacct, and QuickBooks Online—via a third-party iPaaS tool.

Automation and Integration

Automation & Integration Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ▨ Not provided

A visual workflow builder helps guide less-technical users through the process of setting up workflows. You can set up multiple custom workflows in the system.

The system allows you to send trigger-based email reminders and trigger-based notifications, as well as date-based reminders and notifications. The date-based reminders can be set up with relative dates, so you can set up emails to go out 10 days before a report is due, for example, or three days after an application is submitted.

The vendor reports that it is building a native eSign integration, as well as an integration with DocuSign, which will be available later this year. The ability to use the system's APIs to build custom integrations is available to clients as an add-on at an extra cost. The system uses a third-party iPaaS tool that facilitates drag-and-

drop connections to nearly two dozen CRMs and nearly 20 financial management tools.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ▨ Not provided

The system does not have a universal search but there are search bars at the top of each module.

There are four standard dashboards, as well as one for the financial module. The vendor has integrated a third-party business intelligence tool into the system and also offers data warehouse capability for clients who want to use a different BI tool, such as PowerBI or Tableau. The advanced report builder leverages this BI functionality to allow you to build additional custom dashboards. The tool lets you drag and drop fields into a report, apply filters, and then apply a large variety of charts, visualizations, and functions. These reports can be exported as PDF files.

The system also provides more traditional table-based views that you can select columns for, sort and filter. You can export the data from these views to Microsoft Excel for reporting.
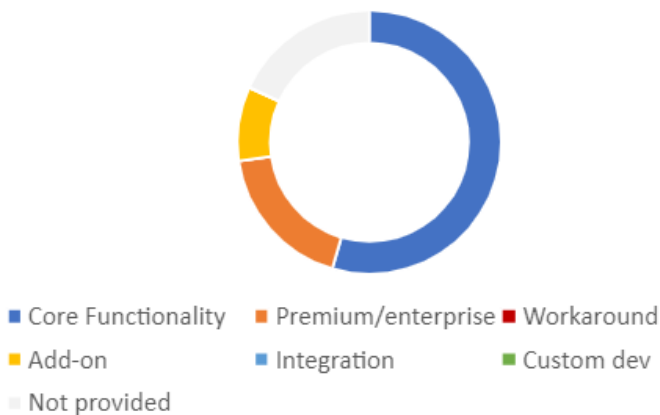
Standard report libraries are available to all clients, and the vendor says it is continuing to build additional standard reports based on client feedback. Standard reports cannot be changed or customized. Clients with the advanced reporting module can create their

own reports and dashboards, including reports across programs, and can schedule the reports to run at other times. You cannot favorite reports. The vendor provides some training and the initial build-out of advanced reporting, and also has an in-house team that can provide additional training and assistance at an extra cost.

In addition to advanced reporting, an outcomes measurement module is available at an extra cost to help track goals, milestones, and outputs.

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The vendor reports that the system complies with WCAG 2.1 accessibility guidelines. The site was designed to be mobile-first, so it displays properly across a range of devices.

The system does not come with a preloaded taxonomy, but clients can import or create their own taxonomies. Custom taxonomy is not available for Core subscribers. You can do mass data exports and can mass import data from CSV files or Excel sheets. You can do this for several data objects in the platform by downloading a template, adding your data, and then uploading it to the system.

The system allows you to award grants in a variety of currencies, but does not store exchange rates. Premium and Enterprise subscribers can display multilingual content and the system includes an integration with Google Translate.

The vendor currently has two beta AI features in limited release. One uses AI to summarize grant applications and the other uses AI to score and comment on applications that can be compared with human reviewer scores and comments.

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
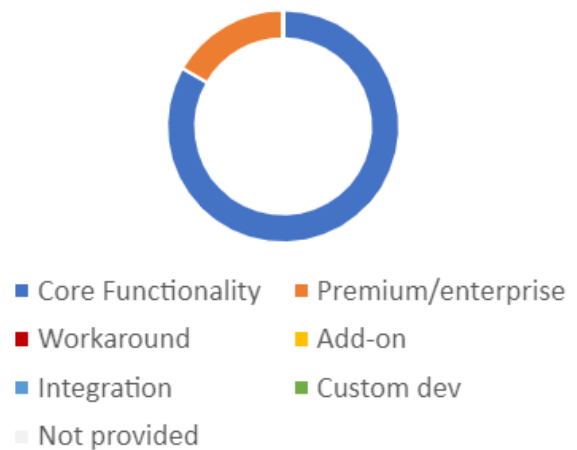
Login security is controlled by multi-factor authentication. Premium and Enterprise subscribers have the option to enable single sign-on. Access to the system is governed by simple role-based permissions. Individuals can have more than one role in the system, and the system includes an audit log of all changes made to the database. Data is encrypted both at rest and in transit.

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat			X
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community			X
Implementation		X	

The vendor offers phone and email-based support to clients. All clients are assigned a client success manager in addition to their support team. The vendor offers a knowledgebase and training videos, but does not have a user community.

For simple implementations, the vendor reports that it can get the system set up in just a few days. Implementation is not included in the subscription pricing for the system. The vendor offers both guided and hands-on implementation packages, which are based on how much training and implementation support a client needs.

Customer Experience Survey
Number Of Survey Respondents Using the System: 10
Percent Who Would Recommend the System: 90
Training Rating: 3.17/4
Implementation Rating: 3.28/4
Support Score: 3.10/4

Note: NextZen is a new system released in 2024 by WizeHive as its next generation grants management platform. This customer experience data is for its Zengine product.

Salesforce Nonprofit Cloud for Grantmaking
www.salesforce.org/products/grantmaking/

Vendor: Salesforce
Year Released: 2023

Pricing
Salesforce Nonprofit Cloud (NPC) for Grantmaking is priced based on the number of users and the tier selected. With an annual contract, the Enterprise Edition costs $175 per user, per month; the Unlimited Edition is $225 per user, per month. This includes Grantmaking as well as the full Nonprofit Cloud functionality, including fundraising, program management, case management, and outcomes features. Salesforce's Einstein AI assistant, Copilot, is available for Grantmaking customers via an add-on license.

Yearly license fees do not include implementation. Customers are encouraged to use external partners for implementation, but the vendor offers Salesforce Professional Services for implementation to customers who choose not to use an external partner.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $2,100-$13,500
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $21,000-$67,500
- **Large Foundation (> $500 million in grants, 50+ staff):** $105,000+

Overview
Launched in summer 2023, Nonprofit Cloud for Grantmaking is Salesforce's newest entry into the grants management market. The product is built directly into the core Salesforce platform, unlike both Grants Management—which is a managed package—and the open-source Outbound Funds Management. Customers get access to Salesforce's powerful CRM, reporting, and automation tools. In addition, being a part of the core platform allows the system to leverage tools built for other Salesforce

industries, like a form builder and timeline builder.

The platform offers customizable dashboards with drag-and-drop widgets, branded constituent portals you can create using a WYSIWYG editor, and access to Flow, Salesforce's drag-and-drop workflow builder. You can also set up a variety of action plans associated with applications and awards to automate task assignments that are repeated for each new record.

Grants Management

Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The platform allows you to track grants throughout their entire lifecycle. Grant programs are the top of the hierarchy, set up in the system as funding areas; below the funding areas are funding opportunities, which can be public or invitation-only.

There is a great deal of flexibility in setting up your home page in the system. All of the terminology, field labels, field order, and layout is configurable. Users can customize their own home pages with a variety of widgets. Records display in list views, which can be filtered and searched, and you can have as many filters and list views as you want. These list views can also be public, visible to all internal users, or private.

The system allows you to perform status checks against third-party databases like Candid GuideStar, the IRS master file, and OFAC, but

this is done through API configuration and requires you to have a separate license or subscription to the service. Salesforce does not host external data sources. The vendor notes that it is creating a step-by-step guide to help clients configure the connection between Candid and Salesforce by employing the system's Flow tools to bring in the external data.

Applications and awards are two separate objects in the database. The application process covers information collection and reviews. Once a decision has been made, a new award record is created, which is linked to the application record. This allows you to see the application details on the award record, and you can also clone fields from the application over to the award record if they are needed for automation.

Eligibility quizzes can be configured using the system's drag-and-drop workflow automation builder, Flow. Applications can include a wide variety of field types, such as rich text, pick lists, lookups, and tables. The system allows you to create templates for capturing information, like budget templates, calculations, and formulas. Applicants can upload files under 2GB to applications, but there are organization-wide storage limits based on the organization's license type. Custom development is required to allow applicants to download completed applications with all their attachments. The system allows you to track the time an applicant spends completing an application, which can help identify application processes that impose significant burdens.

The system allows applicants to collaborate with foundation staff by adding notes that use the system's Chatter functionality. Foundation users can see in-progress applications in the system and help the applicant before it is submitted. The vendor recently added the ability for external users to collaborate. This allows an applicant to invite users from other organizations to work on an application, as long as the user has an account in the system. This also lets grant writers use a single login to work with multiple organizations in the system.

The grantee portal leverages Salesforce's Experience Cloud, which lets you create branded external user portals through a WYSIWYG editor. New users can register and log into the system to complete their profiles and start applying. The system will perform duplicate checks during the registration process and prompt users to enter or retrieve their passwords if accounts already exist. They cannot prepopulate information in their profile during registration using their EIN, but once they log in, you can use an integration with a third-party data repository to prepopulate areas of their organization profile.

Grantees can also use the portal to track their grants, requirements, and scheduled payments, as well as submit progress reports. Progress reports can bring in fields from the original application through workflow automations to help grantees with their reporting. Grantees can also submit grant amendment requests through the portal.

External reviewers use the same portal as grantees, with views driven by role-based permissions. You can control what parts of the application the reviewers see, but the system requires custom development to allow them to download completed applications with all attachments. It supports a variety of scoring rubrics and each score is stored as a separate object, which makes it easy to roll up and report on scores. You can assign reviews manually or use flows to auto-assign applications for review.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

The core of Salesforce is its sophisticated CRM. The system supports individual and organization records as well as the ability to define a wide range of relationships. Organization and contact records can include demographic information.

You can track a variety of interactions in the system, including meetings, calls, emails, letters, and events. You can send emails through the system to individuals or groups of contacts. There are also plugins for both Outlook and Gmail to capture emails sent outside the system.

Document generation functionality allows you to create grant agreements and letters. You can create templates in Microsoft Word or Google Docs and upload them to the system. These templates can include merge data simply by adding the fieldname in between two curly brackets and making sure that the field name as you've typed it is included in the mapping document. There is also an integration with DocuSign.

Financial Management

Financial Management Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- ■ Not provided

A disbursement scheduler tool allows you to create payment schedules, which can be automated using Flow. You can also schedule payments manually and edit payments that have been scheduled. Payments can be split across budgets and they can be made contingent on the completion of requirements.

The system includes the ability to set up program budgets and track disbursements against those budgets. You can see how much has been committed, disbursed, and remaining. You can also do forecasting. An add-on available at an extra cost allows you to do more advanced financial activities, such as "what if" scenarios and PRI interest payment tracking. The system does not include an accounting module, but the vendor reports that connectors already exist for Sage Intacct and Oracle NetSuite integrations, in addition to several other accounting solutions.

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system includes the ability to create action plans, which are templates of repeatable tasks that include priorities, timeframes for completion, and team members responsible for completing the tasks. Action plan templates can be associated with specific applications and awards for tasks like due diligence or reviews. Salesforce's drag-and-drop workflow automation builder, allows you to create a wide variety of automations. Flows can be added to action plans. You can set up a wide variety of automated emails through the system in addition to email reminders for tasks.

Over the years, numerous third-party software platforms have built integrations with Salesforce that allow you to extend the functionality of the core CRM. These integrations run the gamut from accounting to cloud storage to messaging, productivity, and email marketing. The company's AppExchange includes more than 4,000 pre-built integrations for the platform. In addition, both open and private APIs are available for custom development and Salesforce offers the Mulesoft iPaaS as an add-on for an extra cost to provide you with numerous connectors to popular software platforms.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system includes a universal search function powered by Einstein that will return results from across the system, even including content in attachments.

Salesforce offers sophisticated dashboard functionality. You can set up role-based dashboards tailored to different groups of users. A variety of widgets are available to drag and drop onto dashboards, and can include reports, charts, task lists, RSS feeds, and rich text fields.

Dashboards are interactive—you can drill down to the underlying data, and they display real-time data from the system. You can add comments to the charts using the vendor's Chatter feature, download the reports, or send the entire dashboard to individuals via email. Individuals can subscribe to dashboards, as well.

The system does not come with any out-of-the-box reports, charts, or visualizations. You can create a wide variety of ad hoc reports using data across the system. These reports can be scheduled to run, sent to individuals, and added to dashboards. There are many charts and visualizations to choose from. You can also connect to Salesforce's business intelligence platform, Tableau, and pull data directly in from the system, provided you have a creator license for Tableau.

Salesforce's Nonprofit Cloud now has outcome management functionality to help you track goals and outcomes. The vendor just released the ability to ask applicants to add outcome activities to their applications and report back on the results; you would then be able to use these numbers for cross-program reporting.

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
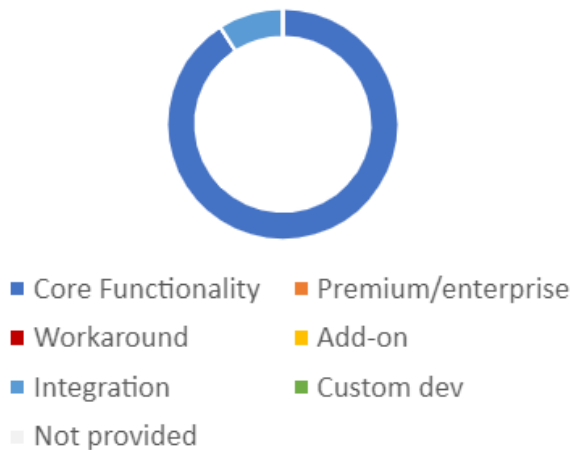
The vendor provides information on the platform's accessibility standards on its website, noting that it follows the WCAG 2.1 Level AA guidelines "to the extent possible." The system is designed responsively to display across a range of devices.
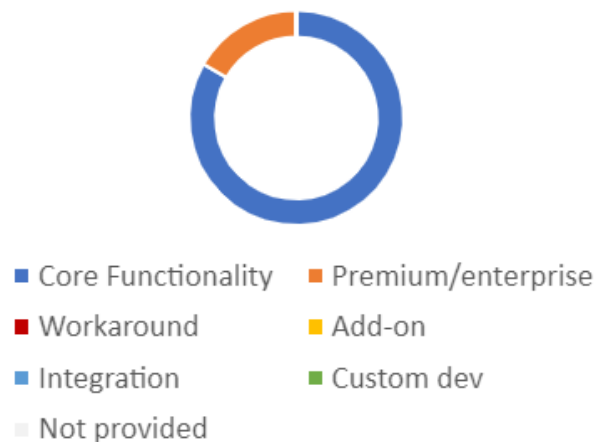
The system comes preloaded with a standard common grantmaking model. You can also define your own custom taxonomy and configure the system to allow predictive tagging of information entered.

As an international company, the system includes multi-currency support, including the ability to store exchange rate information for transactions, as well as multilingual support. Salesforce's Translation Workbench is a built-in tool that provides all your field labels and instructions in an Excel sheet that you can provide to a translator and load back into the system once the translated values have been added. Organizations with a Google Cloud Translation API key can integrate Google Translate with their system.

The vendor's Einstein AI platform is available as premium subscription level or as an add-on. It lets you interact with your own data through a large language model (LLM) interface for natural language searches and data analysis. A prompt builder allows you to create prompts for repeated use. Salesforce maintains data privacy by sending over the information in the prompts to the LLM as masked tokens.

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The vendor provide a great deal of information about its security policies on its website, and its Trust Center provides information about system status and privacy policies.

Login security is protected by two-factor authentication, and the system can also integrate with single sign-on. Salesforce also offers an authentication app for mobile devices to provide additional security. Access to the system is governed by role-based permissions. Administrators have granular control to grant, limit, or restrict user access—not only to a wide variety of system functions, but also on a field-by-field basis. The system retains full audit info for two years and a separate product will allow foundations to retain this information for 10 years.

The system provides encryption at rest for all clients and also encryption in transit for premium/enterprise customers.

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat		X	
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

Nonprofit Cloud for Grantmaking licenses also includes a Service Cloud license. This provides access to the knowledgebase and Salesforce user community, as well as phone and email support. Applicants can also access support via a self-serve portal that allows them to access knowledgebase articles and submit support requests.

Implementation is not included in the yearly license fee. The vendor encourages clients to use external partners for implementation; Salesforce Services are available for implementation to customers who do not choose to use an external partner. Trailhead is Salesforce's online learning platform, and there are trails available for the Grantmaking product.

*Note: Salesforce Grantmaking is a fairly new product. This customer experience data is for the Salesforce Grants Management product. Also note that Salesforce implementations are often done by outside consultants rather than the vendor.

Customer Experience Survey
Number of Survey Respondents Using the System: 4
Percent Who Would Recommend the System: 100
Training Rating: 2.56/4
Implementation Rating: 2.50/4
Support Score: 3.24/4

SmartSimple Cloud
www.smartsimple.com

Vendor: SmartSimple Software Ltd.
Year Released: 2002

Pricing
The platform is built around one database with modules that operate independently but that can be connected to each other. The annual subscription fee is based on several factors, including the number of internal users; the number of hours they spend in the system each month; external users, including reviewers, applicants, and others; hosting preference (multi-tenant, single tenant, on-premise); and optional add-ons, such as the vendor's High Performance Private Cloud offering and AI features. Implementation pricing is determined by the complexity of the client's needs and processes, the modules configured, and any integrations that are needed.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** $6,000 - $50,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $50,000 - $200,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $200,000 +

Overview
Originally built as a sales-tracking tool with CRM capability, SmartSimple Cloud has developed into a business process automation tool with grants management capabilities. The platform consists of a core database and interconnected modules that correspond to a client's needs. There is no out-of-the-box grants management option, as the platform is configured to the client's requirements during implementation. Because the implementation pricing takes into account the modules that are needed, costs vary according to which features you need. While this increases the complexity of implementation, it also results in a flexibility that allows it to adapt to changing needs and growth. The system's grants management-

related modules include the Application Manager, Program Manager, Budget Manager, and Meeting/Panel Manager for more complex review processes.

Grants Management

Grants Management Overview

■ Core Functionality ■ Premium/enterprise
■ Workaround ■ Add-on
■ Integration ■ Custom dev
□ Not provided

The system lets you track the entire grant lifecycle and easily access all related information. Grant records are stored in the system with connections to the applicant profile, which contains organization and/or individual data including contact information, profile data, other applications and grants, interactions, and more. You can validate profiles against IRS data and perform GuideStar Charity and OFAC checks, provided you have a GuideStar subscription. These status checks can be scheduled to run periodically.

A grantee portal provides a streamlined view that features icons to access tasks, current applications, and open funding opportunities for applicants and grantees. New users can create a profile the first time they log into the grantee portal and can populate their organization profile with basic information by entering an EIN. Portal users can complete grant applications, submit required reports, check the status of submitted applications, correspond with foundation staff, and manage both user and organization profile information, based on their assigned user roles and permissions.

Grant applications can feature a variety of question types, with sections organized in tabs across the top of the application. The form also includes a completion bar at the top of the page. Administrators can set up an application from scratch or copy previous applications. Applications can be multi-stage and can include questions with branching logic. If an applicant already has a profile in the system, the application can be prepopulated with any of the data that's in the profile. Data entered into the application is saved automatically at a predefined interval set by the administrator.

The vendor has been developing a variety of AI-powered features for the system. One feature it has piloted is the ability for applicants to upload PDFs of applications they have submitted to another funder that the AI will parse, map the values to corresponding areas on the application, and populate the fields for them. The vendor also offers AI transcription of audio or video recordings, which could allow grantees to upload reports as audio or video files and the foundation can get the transcription.

External reviewers can access the system using the same portal as grantees, but will see different actions and views on the landing page based on assigned role. The system supports both narrative and numerically scored reviews, and administrators can see summary statistics for reviews that have been submitted. Admins can also allow reviewers to see others' scores and comments on applications, if they wish. If reviewers don't want to work within the system, they can download the review form in spreadsheet format and score the application offline; the admin can then upload the spreadsheet into the system to extract and map the data into system fields.

The system tracks the amount of time that a record has spent in a particular status as well as the amount of time it has taken to go from one status to another. It is not limited to applicant submission, but can be used to

identify potential roadblocks at other statuses in the client process, such as board or executive review.

Relationships and Constituent Management

Relationships & Constituent Management Overview

CRM functionality is built into the system, so there are a lot of features related to contact records and relationships. You can track individuals, organizations, contacts (individuals employed by an organization), and associates (individuals affiliated with but not employed by an organization). Multiple contacts can be associated with organizations, and contacts can be associated with multiple organizations. You can also associate two organizations with each other, such as in the case of fiscal sponsorship. Relationships defined on a record are reflected on the corresponding record as well.

The platform also provides a pre-built integration with Salesforce. It also has integrations with Candid, Impact Genome, LexisNexis and Charity Navigator to pull in additional data for organizations. SmartSimple Cloud is a Demographics via Candid partner; that information can be added to organizational profiles and used in reporting free of charge. The system also includes a free integration with U.S. Census data that you can use to pull in tract-level demographic data in an organization's geographic area.

All interactions with contacts are recorded and accessible on related records, including

organization, contact, and grant. This includes individual and bulk emails sent through the system, letters and documents generated by the system, and phone calls logged in the system. The system supports customizable email, letter, and document templates that contain merge fields to add in system data. The platform also tracks who opened broadcast emails, when they opened them, and which links they clicked. If you send an email outside of the system, you can use a BCC address unique to the record to bring it into the system as an interaction. The vendor reports that it is currently testing an Outlook plugin that it anticipates releasing in the near future.

When working in the system, there is a tab bar at the bottom of the browser window that lets you open multiple records at the same time. You can also split the screen to view records side-by-side.

Board members have access to board portal functionality that only shows data and tasks related to that role, such as applications for approvals and reports/visualizations of current grant funding.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

SmartSimple can handle payment tracking, budgeting, and forecasting with the proper configuration. You can set up a default payment schedule for grants using business rules, which can be customized. Payments

can be made contingent on the completion of specific requirements. You can collect and store ACH/wire transfer details for payments; stored values are protected by RBAC controls, data retention policy, and field value masking.

The platform does not include accounting functionality, nor is there a pre-built integration with a third-party accounting tool; however, the vendor reports that it has created custom integrations with several popular accounting tools for customers. Scheduled payments can be exported to accounting manually or you can schedule secure file transfers or use the API to transfer them automatically.

The Budget Manager module helps foundations manage budgets and funds. In the module, you can track budgets in hierarchical categories and program areas. You associate grants with funds and this allows the grants team to see the payments that are being drawn down from particular funds. Payments can be split across multiple funds. The Budget Manager module supports "what-if" scenarios, real-time reporting, and forecasting.

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The platform has a strong workflow component that can be used throughout the system to automate processes. Workflows can be attached to any object and then triggered by any status or field level change within that

object. Workflows also support branching logic. Emails can be automated and triggered via workflows, and you can do things like auto-assign reviews based on reviewer workload with custom scripting. Batch updates can be made with the system's Autoloader feature, which lets you upload .CSV or Excel files and map the data to system fields.

SmartSimple supports several APIs: an OData connector; a SOAP-based web services API; and a RESTful JSON-based API. In addition, there are pre-built third-party data connectors for Salesforce, DocuSign, Adobe Sign, and OpenAI. Other integrations include Candid's GuideStar Charity Check, Demographics via Candid, ORCID, PubMed, LexisNexis, IRS, and OFAC.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Rather than a universal search, each system module includes a standard list view of data in the module that you can search and filter, and that lets you build more complex queries. The system also supports keyword searches of all attachments containing text.

There are a variety of dashboards in the system, including common (a BI dashboard), role-specific, and personal (user-created) dashboards. Dashboards include a variety of charts and visualizations that you can use to drill down to the underlying data. The role-specific dashboard displays when a user first logs into the system. You can also share these visuals and custom dashboards with other users. If a user has multiple roles in the system, they can switch between their role-based dashboards without having to log out and log back in. The system also supports the ability to integrate with external visualization tools via OData.

The system does not include any canned reports outside of the BI dashboard, but the vendor builds between five and 10 commonly used reports for every client during implementation. The vendor also provides several custom pre-built reports identified by clients during the requirements scoping process. The list view of data in each module forms the basis for ad hoc reports that can be filtered, saved, and exported in a variety of formats, including .TXT, .CSV, Word, Excel, XML, JSON and PDF. Reports can be aggregated across organizations, programs, and grants. Saved reports can be scheduled and even sent to individuals outside the system; you can also enable the reports to be displayed outside the system, such as on your website. SmartSimple's Outcomes Module can calculate progress toward outcome goals and report across programs/grantees

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The platform is accessible—it conforms to WCAG 2.1 AA—and responsive for mobile and tablet display. It doesn't come preloaded with a taxonomy, but users can define their own taxonomies or upload a common philanthropic taxonomy for use. There are no limits to the number of categories, tags, or codes that can be assigned to a system object.

The platform supports true localization functionality for multicurrency tracking and uses Google Exchange as its default currency service. It also supports multiple languages, allowing users to switch from one language to another preferred language. Each field supports multilingual captions, help text, and validation messages. When the user selects their language of choice the related language captions are displayed. In addition, the system also provides in-system field-level translation features.

SmartSimple has developed a number of AI-enabled features. Foundations need to select an AI provider and set up their own license. AI-enabled features include the ability to analyze tables and data in the system, translate text, summarize application content, pre-screen applicants, and allow applicants to upload PDFs of previous applications and reuse the data to populate fields in a different application.

Security and Privacy

Security & Privacy Overview

■ Core Functionality   ■ Premium/enterprise
■ Workaround   ■ Add-on
■ Integration   ■ Custom dev
■ Not provided

SmartSimple's Trust Portal provides detailed information on security and privacy practices, compliance, system status, and more. The platform supports SSO via SAML 2.0 and multi-factor authentication through email, authentication tools (Google or Microsoft Authenticator), or SMS (at an additional charge). Data is encrypted in transit and at rest. A detailed audit log tracks all changes made in the system,

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat	X		
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation		X	

Customers can access phone and chat-based technical support 24 hours a day, five days a week; support for critical issues is available 24/7. Email support and the community support portal are also available at all times. The vendor offers an optional premium support service at an additional fee, which provides you with a dedicated service representative to help with implementation questions, additional training, and/or limited configuration work. During implementation, clients access system administrator training via prerecorded videos. The vendor provides a public wiki, monthly webinars posted to its YouTube channel, client workshops and an annual conference to facilitate learning and education around the platform. Regional user groups connect users to each other.

Customer Experience Survey
Number of Survey Respondents Using the System: 22
Percent Who Would Recommend the System: 95
Training Rating: 2.75/4
Implementation Rating: 2.85/4
Support Rating: 2.98/4

Submit.com
https://submit.com/

Vendor: Submit Software Solutions Ltd.
Year Released: 2013

Pricing
System pricing is based on the maximum number of forms a foundation would like to have active in the system simultaneously and the number of users of the system. The vendor works with each potential client to develop a custom quote. Initial system implementation is included in the yearly subscription cost.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** Starting at $5,995
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** Starting at $8,995
- **Large Foundation (> $500 million in grants, 50+ staff):** Starting at $13,500
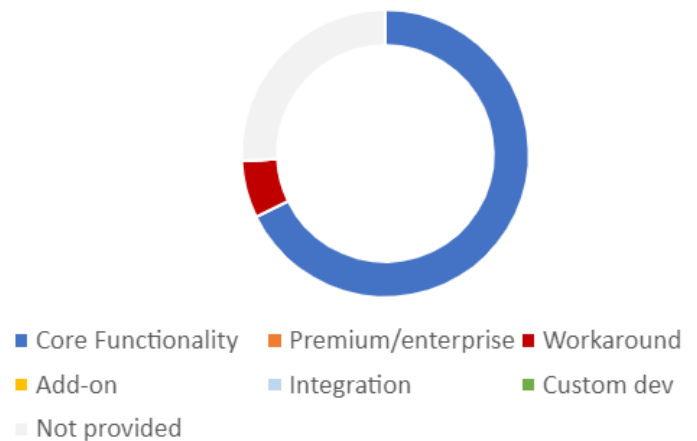
Overview
Submit.com provides strong support for grant applications, form building, and grant tracking, and is one of the lowest-priced options among the systems we reviewed; pricing starts as low as $5,995 per year, including implementation costs and support. The Ireland-based software company has a sizeable international client base, and as such, may be of interest to foundations that provide grants to non-U.S. organizations—particularly those in European countries. The software includes an alternate language dictionary that a foundation can use to create dual-language buttons and labels, as well as strong privacy and data-protection controls that help foundations comply with GDPR requirements. However, the system does not include integrations with U.S.-based data repositories that provide EIN lookups and status checks.

The platform, which provides foundations with flexibility in setting up grant processes that align with their internal workflows and decision-making, has limited CRM functionality and limited finance and payment tracking options. Workflow is managed through the use of tags, which can also be used to filter reports and search queries. The system does include a Stripe integration that allows you to collect payments, which can be used for event ticket sales and other e-commerce needs.

Grants Management

Grants Management Overview

Legend: ■ Core Functionality ■ Premium/enterprise ■ Workaround ■ Add-on ■ Integration ■ Custom dev ■ Not provided

The movement of grant applications through the funding lifecycle is the central focus of Submit.com. Applicants can create a profile or login to a simple portal to apply for grants, view past applications, submit grant reports, and exchange messages with foundation staff. Applications are mobile friendly and display one question per page, with navigation between questions on the left side; the system saves applicant data each time they click "Next." The system does not support auto-population of organization data based on EIN, but can auto-populate an application with information from the database if the applicant has previously applied for a grant. Applicants are not able to duplicate or clone their previous grant applications to use in a new grant, but admins can clone previous applications for an applicant. Organizations or individuals can complete applications. The system currently does not allow multiple users to collaborate on an application, but the vendor reports it will be adding collaboration tools later in 2024.

It's easy to build new applications in the system. When creating application forms, you can copy questions from previous applications and/or copy or clone previous application forms. Applications can include a wide variety of question types, including the ability to allow applicants to create a video recording of responses to questions. Every time you make a new grant application, the system generates a QR code and a link that goes directly to the landing page. Each question is created using a WYSIWYG editor and you can control font size, weight, and color.

Applications can also include budget entry tables that automatically calculate totals from entered data. Applicants can upload a large variety of file types to the system—as long as they are under 300MB in size—and can upload up to 20 files per question; there are no file storage limits in the system. You can capture and authenticate digital signatures on applications, and foundation staff can also see the date and time an applicant first started the form, when it was last saved, and the percentage complete.
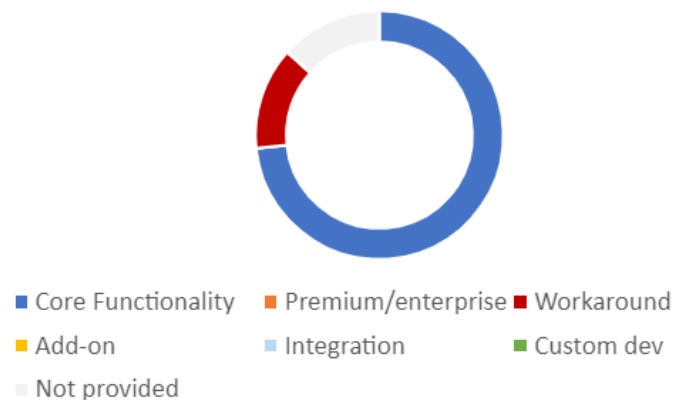
Once submitted, applications can go through internal and external reviews, depending on the foundation's needs. External reviewers can access the system with their own login credentials but are limited to seeing only the folders for which they have permissions and the applications inside those folders. Reviewers can score and comment on applications, with numerical scoring being done using slide bars; you can have as many score bars as you want and they can have different weights. As a reviewer scores the application, they can see the total score and the average score; admins can see the total scores and averages for all reviews.

Grant records are application records that are just in a different phase of workflow. They include all the data from the application, along with any interactions, comments, and attachments. Interactions appear on grant records but not on contact records. You can add notes, log phone calls, capture emails sent through the system, but emails sent outside the system have to be cut and pasted into a comment to appear on records. The system does not provide automated 501(c)(3) status checks, so those would need to be done manually and added to the record. Typical workflow phases include application, acceptance, and claim phases, but admins can build as many phases as needed. The workflow is governed by the tags on the record—you can filter grants in the system by tag, or you can use the universal search at the top of the login dashboard to find a grant or a grantee. It provides a full-system search but does not search the content of attachments.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

All applicants that apply for any grant on the platform have their own contact records; these can be either individual or organization records. These records includes contact information, relationships, and notes, and can also contain demographic information that can be used in reporting. Demographic information can also be collected on grant applications. Interactions appear on grant records, not on contact records.

Foundation staff can send individual and bulk emails through the system, but it does not track opens or clicks. Emails can include custom content from system fields and can be personalized before sending. Currently you

are not able to schedule emails to send at a certain time, but the vendor reports that this functionality is planned in a future release. Board members can be provided with system logins that provide limited access so that they can view and print materials placed in folders they have permission to see, providing a basic board portal functionality. You can also use permissions to provide board members with additional access to the system, if desired.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system includes limited payment tracking functionality. You can add payment dates to grant records, but it's more for information and reporting purposes than for scheduling. When you create new grant applications in the system, you can set budgets for the grant and track drawdowns and remaining budget as grants are awarded. The system does not allow you to split grants across more than one program budget, but the vendor says this is something you can do manually and log in the database. There is no forecasting functionality or ability to look at "what if" scenarios. The system does have an integration with Stripe that allows you to accept payments on forms, which can be used for purposes such as event ticket sales.

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Workflows in the system are set up as application phases and are managed through tags. Once a phase is complete, foundation staff can update the tag on the record and it will trigger notifications to team members responsible for actions in the next phase. You can set up multiple custom workflows within the system to account for different grant activities. Notifications are delivered through automated emails.

Submit.com includes a private API available with extensive documentation. The API can be used to send payment requests to accounting software or to integrate with reporting and BI tools. The ad hoc reporting function in the system allows you to select data in reports to be available for the API. You are able to make batch updates to records in the system via file uploads.

In addition to Stripe, the system also includes an integration with Google Maps that can be used in grant applications and reporting as well as for display on your dashboard. The vendor reports that it can create custom integrations with Microsoft Word and/or Google Docs or with other third-party API connectors.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

When you log in to the system, the dashboard that displays shows you the most recent applications that have been submitted as well as upcoming deadlines. The content displayed on this dashboard is determined by roles in the system; users cannot create custom dashboards.

The system does not include any prepackaged reports, but there is extensive ad hoc reporting available. You can choose data from different types of records in the system to display in a report and display certain types of data in pie and bar charts and on maps. You can also interact with the charts to filter the data that appears in them. Reports can be downloaded in .CSV format or you can select data to be used with the API. While you can't mark reports as favorites, the system will remember the last settings you used and display those the next time you access the report. Reports cannot be scheduled to run at specific times.

You can collect impact or outcome data in grantee reports and include that data in reporting, but the system will not automatically calculate progress toward goals, and you can't report across programs.

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system was built to comply with WCAG and the vendor reports that it is continually working to improve the accessibility standards of the platform. The system is designed responsively for display across a variety of devices, and the format of the applications in particular is optimized for mobile devices.

Tags are used for workflow. System admins create the vocabulary used for those tags; there is no preloaded taxonomy. Users can add their own tags to the system, but admins can restrict their ability to do so with permissions.

The system currency can be changed depending on the customer's locality, but multicurrency capabilities require custom development. An available alternate language dictionary allows you to set up dual-language buttons and labels, but you would need to provide the vendor with your translations via a spreadsheet they would use to configure the platform. Doing this allows you to have control over the languages and translations used for buttons and labels so that you can display them in two languages. The vendor reports developing additional multiple language support and translation capabilities, which it expects to release in 2025.

Security and Privacy

Security & Privacy Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Submit.com has a comprehensive overview of its security and operational policies available online. The document includes security policies, incident management policy, business continuity plan, and more.

Administrators can enable multi-factor authentication, single sign-on, or both together. You can also enable social logins, which lets users sign in using their Google, Facebook, LinkedIn, or Microsoft Online credentials.

Users have role-based access to the system. There are four main roles: team leaders, who have admin functionality across the system; team members, who have more restricted access; external reviewers; and candidates (or applicants). Team leaders can see all grants on the platform and manage permissions for other team members, while team members only see grants they've created themselves or that they have been added to. The permissions function provides the ability to set up profiles or roles with fairly granular control over what the users can or can't do in the system.

The system includes three different audit logs that track every change to all applications; these logs can be accessed with the system's reporting functionality.

The vendor has built a lot of privacy controls into the system in order to comply with GDPR requirements. This includes providing all system users the ability to control what types of email notifications they receive, and a tool that lets you set your own retention policies for data in the system. You can set it to delete all data after it has been in the system for a specified time frame or all data marked with certain tags.

Training and Support

	Included	Additional Cost	Not Available
Phone	X		
Chat	X		
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation	X		

The vendor provides robust user training and support options. A YouTube channel includes short "how to" videos and case studies, and the vendor offers a searchable knowledgebase on its website. System implementation is included in the yearly subscription price, as is unlimited user support.

Customer Experience Survey
Number of Survey Respondents Using the System: 13
Percent Who Would Recommend the System: 100
Training Rating: 3.93/4
Implementation Rating: 3.80/4
Support Rating: 3.64/4

Submittable
submittable.com

Vendor: Submittable
Year Released: 2010

Pricing
The vendor offers three different packages: Starter, Professional, and Enterprise. Each package offers features to meet differing levels of complexity. The Starter package has a limit on the number of applications and team members, but includes online applications, forms, grantee portal, reviews, and standard reporting. Advanced reporting is available as an add-on to the Starter package. The Professional package adds a variety of additional features, including real-time applicant collaboration, advanced reporting, API access, and preferred support. The Enterprise package includes custom branding, custom integrations, and professional services.
Implementation costs are not included in the yearly subscription costs; pricing is based on the complexity of the implementation.

Estimated Yearly Costs
- **Small Foundation (< $25 million in grants, 1-5 staff):** $10,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** $10,000-$50,000
- **Large Foundation (> $500 million in grants, 50+ staff):** $50,000+

Overview
Submittable is a user-friendly platform that offers a very robust application and form builder and review workflow capability. This includes multi-stage applications and multi-stage reviews, as well as live collaboration on applications. Forms are created using drag-and-drop functionality, and a large variety of form types and field types are available in the system. Users can make their own changes to forms, workflows, reports, and budgets at any time during the program lifecycle, with changes reflecting instantly across the system.

The system's Organization Profiles are powered through integrations with Candid and/or SAM.gov, and can be enriched with custom fields and notes to capture additional data. The system does not offer individual profiles, and interactions are stored on application/grant records. It comes with basic budget and payment functionality, and an optional module allows you to create default and custom payment schedules for grants. All subscribers have access to a variety of standard reports; Pro and Enterprise subscribers can use the system's advanced reporting functionality. Several AI features are available, including a tool to help applicants reduce the time it takes to fill out applications, a tool to help administrators build and translate forms quickly, and a smart import tool.

Grants Management

Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The core of the system is a robust application and post-award reporting tool, which allows you to easily create a variety of forms using a drag-and-drop form builder. In addition to application and reporting forms, there are reference forms that are triggered by applicants sending a request to their references. References can fill out the form and submit it without needing to create a username and password. You can also create request forms that a grantee can trigger to submit amendment or reimbursement requests and can associate those forms with their own review and approval workflows.

The system allows you to set up eligibility forms for potential applicants. In addition to standard eligibility questions, you can restrict eligibility to different types of nonprofits and use an organization's EIN or UEI to determine what type of nonprofit it is. Eligibility forms cannot branch to multiple applications.

The system supports a variety of form fields. These include standard form fields like open text and address fields as well as dedicated fields for EIN, UEI, and Social Security numbers that only accept the correct number of digits. Bank account fields confirm that applicants have entered the correct number of digits in their routing number. You can also add rating fields to all forms. There are two built-in tools for screening applicants for fraud: one is knowledge-based authentication, which verifies identity based on answers to questions; the other uses an upload of the applicant's ID and to match a selfie to the ID.

You can allow applicants to upload more than 70 different types of files to applications. There is an 800MB size limit on file uploads, but the vendor says it often increases that limit when requested. Data entered into the application is autosaved.

The applicant portal also serves as the grantee portal. You can brand the portal with out-of-the-box tools, or the system supports customized CSS branding that can mimic the look and feel of your website. You can also use rich text in the instruction section of a form to highlight or emphasize important information.

Organization Profiles in the system are powered by Candid and/or SAM.gov. Grantee updates to organization records need to be made through Candid or SAM.gov. New applicants can enter an EIN or UEI to match themselves with an organization, or select their organization from a list. The vendor reports that it is adding the ability to create organization profiles for nonprofits, foundations, and businesses

based in the United Kingdom and Canada; this functionality will be available later in 2024. Individuals like grant writers who work with a variety of organizations can use the same set of login credentials and choose the organization they are working with for that application.

A managed collaborators' tool allows applicants to invite others to collaborate with them on a form and allows for live editing and tracking, like Google Forms. Applicants are not able to download all the application questions ahead of time unless the foundation copies the full form and creates a PDF of the application to make available on the site.
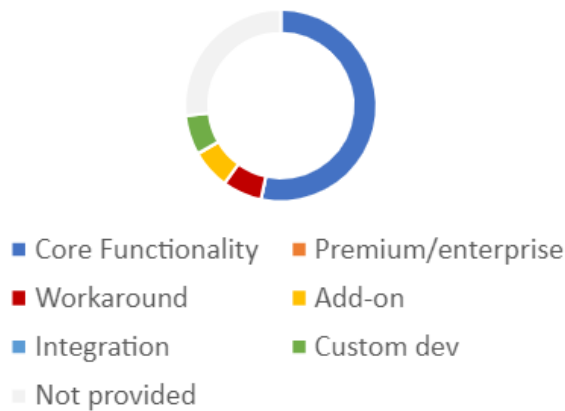
The system supports multi-stage reviews with different types of reviews. You can designate as many stages as you want and auto-assign reviewers for each stage. Pro and Enterprise clients have the ability to set up custom automations that use their criteria to identify the top applications and auto-filter out any others. So, for example, a foundation can use an automation to automatically check an applicant against Candid GuideStar Charity Check and OFAC and filter out any applicants that don't meet the criteria. These automations are created by the vendor and scoped out on an individual client basis.

External reviewers receive permission-based access to the system that provides a streamlined view with access only to their assigned items. They can view the application side-by-side with the review form. Review forms allow you to designate questions within them as shareable with applicants. Once a review is completed, you can decide whether to share the contents of that field with the applicant as anonymous feedback. Shareable fields are marked with an eyeball icon.

Administrators have access to a reviewer workload progress dashboard and can view aggregate scoring data across all reviewers for an application. This includes average and total scores.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system supports Organization Profiles but does not support individual records. Foundations can create custom organization details and add them to the profiles powered by Candid and SAM.gov, as well as add notes to profiles. Organization records show all applications, awarded grants, and funds distributed—as well as individual contacts associated with the organization—but you cannot define custom relationships between records. You can bring Demographics via Candid information into organization records as well.

System initiated email message threads and other system-generated interactions are saved to application records. Interactions with organizations can be manually entered as notes on the organization record. There are no native document generation or management tools in the system, but there is an integration with DocuSign that allows you to add system fields to your DocuSign template and can be used for things like grant agreements.

You can provide board members with permissioned access to the system to be able to see relevant reports, but there is not the ability to upload documents like agendas to the system for them to access.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided
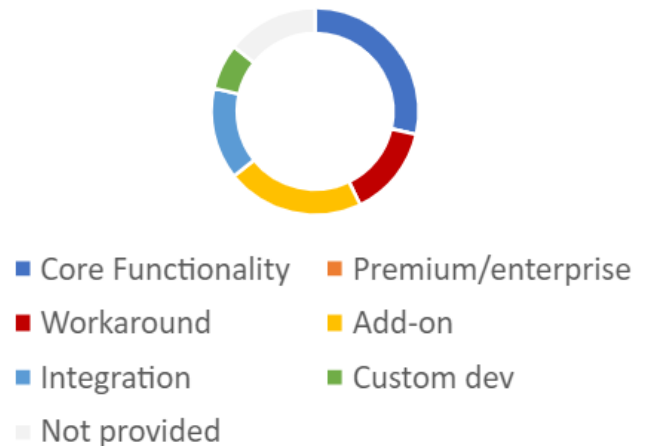
The ability to define payment schedules requires the Orchestration Module add-on. This allows you to define default payment schedules based on a program or application and also set up custom payment schedules. Grant payments are also added to Organization Profiles. The vendor has also added funds distribution services to their offerings at an additional cost, which supports ACH, check, and prepaid gift card disbursements.

You can export a CSV of payments that are due for accounting and import a CSV of payments that were made. Foundations can use the system's API to build integrations with accounting tools such as QuickBooks, SAP, and NetSuite. Batch payment updates require custom development.

You can track budgets in the system using the funds dashboard, but they can't be set up as hierarchies. You can also access and export a full transaction log of all funds transactions from the dashboard.

The vendor notes that clients are doing forecasting via integrations with business intelligence tools and that you can track PRI interest by creating an additional fund that is populated with interest received from program investments. The system does not include the ability to generate "what if" scenarios.

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

You can create multiple custom workflows within the system, and the vendor will work with you during implementation to create a set of initial workflows. Workflows can be set at the program level and at the form level. The system includes automated confirmation and task assignment emails.

The vendor notes that some of its clients integrate with the Calendar team scheduling tool to manage reviewer assignments. This can be automated and balanced against reviewer schedules and capacity through workflows.

The system has a read/write API that can be used to build custom integrations. There are preexisting integrations with Candid, SAM.gov, OFAC, and DocuSign available for clients to use. The system also integrates with the iPaaS tools Zapier and MuleSoft to allow you to create drag-and-drop integrations with a wide variety of online tools and software.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The system does not include a global search tool, but you can search within each module. Standard reporting is available with all packages. You can make changes to a standard report and then save it as a new custom report. You can't mark a report as a favorite, but you do see a list of the reports you have created. You also can't schedule a report to run at a certain time, but the vendor reports it has helped clients set up automations to refresh and run reports at specific intervals.

Advanced reporting, which is available for Pro and Enterprise users and as an add-on for Starter packages, allows you to report across programs, manipulate the data, and create pivot tables or dashboards. Impact reports, which are also available for Pro and Enterprise users, allow you to look at and aggregate the data you've collected related to a project, but do not include the ability to auto-calculate progress toward goals.

You can also create more sophisticated additional dashboards via integration with third-party business intelligence tools. The vendor will help clients set up some advanced reports during implementation. The vendor reports that it has created a number of integrations with the data warehouse tool Snowflake, which can send to a variety of data visualization tools and has also set up direct data pushes to tools like Microsoft PowerBI.

Technical Considerations

Technical Considerations Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- Not provided

The database and applicant/grantee portal are designed to be mobile friendly. The vendor reports that their system complies with WCAG 2.1 guidelines on accessibility. The system does not come preloaded with a common taxonomy, but clients are able to set up their own custom taxonomy. You can also set up auto labels, which are triggered by responses to an application and that can be used to segment applications.

The system has an optional language localization feature available at an extra cost that allows administrators and applicants to instantly change the language for buttons, menus, static text, and dialog boxes throughout the site. There are 30 languages available to choose from. The system does not integrate with any online translation tools. The funds distribution module can distribute grants in seven different currencies, but the system does not hold exchange rate data.

The vendor does offer several AI features. One is a Chrome browser extension that allows applicants to track answers they have provided on applications and access them through a library and autofill any answers that correspond to questions on a form. Applicants can use the library to copy and paste an answer into a form on any website. An AI assistant can auto-build several different form types based on prompts,

including forms that have been translated into different languages. Their smart import tool extracts information from an official document into form fields. This has been built for W2s and the vendor reports it is working to expand it to other official documents, like 1099s and 990s.

Security and Privacy

Security & Privacy Overview

- ■ Core Functionality
- ■ Premium/enterprise
- ■ Workaround
- ■ Add-on
- ■ Integration
- ■ Custom dev
- Not provided

The vendor provides an overview of its security and privacy policies on its website. A customer terms of service document describes its SLA, and the vendor notes that it can tailor custom SLAs for larger accounts.

Login security is protected by multi-factor authentication, and single sign-on is available for Pro and Enterprise clients. The vendor also offers a "Suspicious Activity" layer of protection, which detects when a session is outside of the user's norm—logging in from a different geographic location, for example—which further prompts the user to reset their password and validate their email address. Data is encrypted both at rest and in transit.

The system includes five preset levels of permission that governs access for users in the system, but the vendor notes that it is working on building additional roles with the eventual goal of making role-based permissions fully configurable. An audit log tracks all actions taken in the system.

Training and Support

	Included	Additional Cost	Not Available
Phone		X	
Chat		X	
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community			X
Implementation		X	

Email support is included for all clients as well as applicants using the system, and you can also choose a support package for additional assistance. Pro subscribers have access to preferred support and Enterprise subscribers receive premium support. The vendor also offers a self-service knowledgebase and training videos.

Implementation is not included in the yearly subscription packages. The vendor offers three different implementation packages.

Customer Experience Survey
Number of Survey Respondents Using the System: 9
Percent Who Would Recommend the System: 88.89
Training Rating: 3.72/4
Implementation Rating: 3.32/4
Support Rating: 3.35/4

Temelio Grants Management Platform
trytemelio.com

Vendor: Temelio
Year Released: 2022

Pricing

The core system costs $10,000 per year, and includes five user licenses; additional user licenses can be purchased. Premium functionality—including the ability to add external reviewers, document generation, and integrations—is available on an a la carte pricing basis. Initial system implementation and ongoing support are included for all users at no additional cost.

Estimated Yearly Costs:
- **Small Foundation (< $25 million in grants, 1-5 staff):** Approximately $8,000-$10,000
- **Mid-Size Foundation ($25-500 million in grants, 10-25 staff):** Approximately $15,000-$30,000
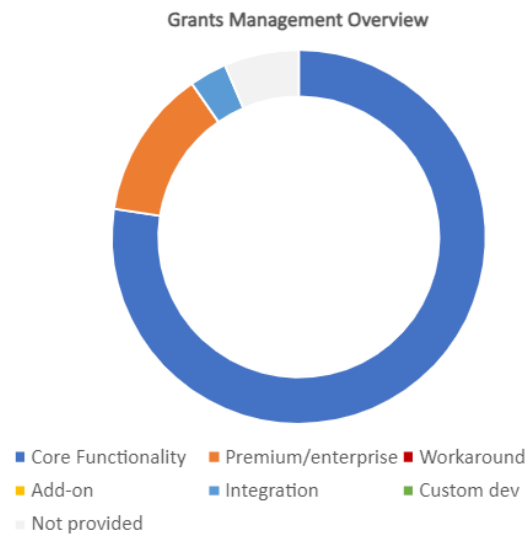- **Large Foundation (> $500 million in grants, 50+ staff):** Approximately $30,000-$60,000

Overview

A fairly new entry into the competitive grants management system market, the Temelio Grants Management Platform is a flexible and user-friendly platform that is evolving to meet the needs of its growing customer base. Temelio was originally built for small to medium-size grantmakers—the vendor continues to add features that appeal to larger foundations while maintaining the ability for all users to customize workflows and systems to align with their internal processes.

Temelio's grantee portals and grants applications have a variety of features that can help foundations minimize burdens on grant applicants. One of those features is the platform's AI assistant, which suggests responses to fields on the grant applications based on the applicant's previous proposals.

The platform has a clean, user-friendly interface with the main navigation on the left side of the page and a universal system search above the navigation. The vendor is very focused on relationship building; new customers are assigned an account manager at the start of implementation who continues to work with the client, even after launch. Implementation costs are included with your yearly subscription, and all ongoing support and configuration is included for as long as you remain a customer. Temelio also provides direct email and chat support to applicants using the system.

Grants Management

Grants Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

Upon logging into the system, users see a dashboard that contains system navigation: the proposal-to-approval workflow, which shows where grant applications are in the pipeline; tasks assigned to the user as well as upcoming applicant and grantee tasks; and upcoming payments. This dashboard is customizable for clients who purchase the advanced permissioning feature at additional cost. The universal search bar on the top left returns matching grantees, grant submissions, tasks, notes, comments, and document titles.

Grant records display the proposal and its status in the system along with internal and external comments and tasks associated with the proposal. The proposal itself can be viewed in PDF format or as a form, and attachments

are all viewable in-system. You can also see a history of changes to the proposal. A button at the top right of the proposal takes you to the contact record for the applicant or organization, where additional information can be accessed.

The grantee portal includes a dashboard that displays the total amount of grants awarded to the individual or organization, proposals in the system along with their status, tasks assigned to the grantee, scheduled and sent grant payments, and documents associated with the grantee. The grantee can also add team members and update their organization's profile through the portal.

New applicants can enter their EIN to auto-populate an application with their organization data via an integration with Candid. Returning applicants will see their applications populated with data already in the system. Temelio also features an AI assistant for applicants that will suggest responses to questions based on previous applications—either from ones previously submitted through the system, or from a PDF of another grant application uploaded by the applicant for this purpose. Applicants can also download application form and ask questions of the foundation.

The form-builder in the system is very similar to Google forms. While there is a variety of question types and functionality—including eligibility quizzes, branching logic, requests for letters of reference, and binding form fields to system fields—users can only make limited changes to the appearance of forms.

Application review includes the ability to create a variety of scoring schemes, add internal notes and comments, and add external comments for applicants to see. Reviewers can download full applications in Word, as a merged PDF, as a merged PDF with inline images, or as a Zip file for proposal at attachments, or they can create custom downloads, but they must be logged into the system to add scores and comments.

A portal for external reviewers is available at an extra cost.

Relationships and Constituent Management

Relationships & Constituent Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The main Contacts page displays a simple table of all grantees, applicants, and other contacts with whom the foundation interacted. The columns that display on the table are customizable, and the table can be filtered by any column.

Temelio supports both organization records and individual records. Organization records can have multiple team members. Out of the box, the vendor provides the ability to access Candid demographic data for an organization and use it to populate system fields aligned with Candid's metadata. The vendor also offers an add-on for an additional $1,000 per year that provides access to other Candid data, such as core metadata and charity check.

Contact records include grant history and all interactions, such as emails, calls, meetings, and payments. An integration with Nylas allows you to automatically pull in all emails and calendar invitations created outside the system in a variety of email applications—including Outlook, Gmail, Yahoo, and Mac—and sent to any email in the organization's record. You can also email contacts through the system individually or in groups, but the system does not track email opens or clicks.

You can create and save a variety of document templates in the system, such as letters and grant agreements, and include custom fields. You can also customize letters and grant agreements generated by the system. The vendor reports that it intends to add the capability to create AI-generated grant summaries later this year.

Financial Management

Financial Management Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The platform does include simple financial management tools. You can create payment schedules for grant awards, and update a checklist of payments that need to go out either manually or via pre-existing integrations with a variety of accounting tools, including QuickBooks, Sage Intacct, Bill.com, PayPal Grants, and Plaid.

Simple budget allocation capability allows you to break down budgets by category; that information is then reflected in data reporting. This reporting includes basic forecasting functionality, allowing you to see how much budget is paid out and committed for fiscal year to date along with dollars remaining. The system currently does not include "what if" scenario planning, but the vendor reports that it is on the Q3 2024 roadmap

Automation and Integration

Automation & Integration Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

During the implementation stage, the vendor works with clients to develop and build customized workflows based on their grant making processes. Post-launch, clients can create their own workflows in the system and set up multiple workflows. Workflows can be set up that auto-assign certain individuals to tasks, but the system does not take into account workload for task assignments. Automated emails are generated to notify colleagues of tasks assigned to them, notify reviewers when they are assigned grants to review, and for some grantee communications.

A variety of pre-built integrations are available. The platform integrates with Candid to pull in organization contact information, which is available to all clients, and extended profile data—which is available at an extra cost. An integration with Nylas can automatically pull in relevant emails and calendar items created and sent in external email applications. There are integrations with several third-party accounting systems, as discussed above, as well as integrations with Salesforce, DocuSign, and MailChimp. There are also integrations available with Microsoft Power BI and Tableau available at an additional cost, although the vendor reports that it does not currently have any clients using these integrations. The vendor reports it has integrations with Microsoft Word

and Google Docs on the Q4 2024 roadmap.

The system does not include any open APIs, but a private API is available for clients at an extra cost. iPaaS connectors are not available out of the box, and require custom development.

You can perform a variety of batch operations in the system, including bulk updates to proposal stages, reviewer assignments, bulk download of the proposals at a given stage, group emails, payment creation, reports, and reminders.

Business Intelligence and Reporting

Business Intelligence & Reporting Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The primary reporting dashboard is a standard financial dashboard with grant totals and budget data that you can filter and click through for details, as well as charts that can be copied and pasted into a presentation or downloaded as Excel files. Custom dashboards, which are available at an additional cost, are set up as additional tabs; as of publication, the vendor must create and set up the custom dashboards, but the vendor reports that users will be able to begin creating their own in late 2024.

Charts and visualizations in the system are displayed as simple bar graphs, and the underlying data can be exported. The

vendor reports integrations with Tableau and Microsoft PowerBI available for purchase, but currently does not have any clients using these integrations.

The platform includes more than a dozen packaged reports, including a 990 report and Candid demographics reports, and the vendor reports that it regularly adds new reports based on feedback from customers. You can make changes to pre-built reports and save them as custom reports. Ad hoc reports are created by searching for the fields you want to use and then filtering the columns to find the specific data you want. Reports can be saved, but they cannot be scheduled. You can report on outcomes that are saved in the system via ad hoc reporting, but there is no ability to automatically calculate progress toward goals.

Technical Considerations

Technical Considerations Overview

- Core Functionality
- Premium/enterprise
- Workaround
- Add-on
- Integration
- Custom dev
- Not provided

The vendor reports that the platform is accessible as defined by WCAG 2.1 guidelines. The system uses responsive design principles to display properly across a range of devices.

The platform does not come with a preloaded taxonomy, but the vendor can bulk upload any taxonomy to the system. Administrators can add custom tags to the system; there is no limit to the number of tags. The system comes with six default grant types, and administrators can add custom grant types as well.

The platform supports multiple currencies for international grantmaking, but does not store exchange rates. You can create content for the system in a variety of languages, but the platform does not include any translation functionality.

An AI assistant is available to all grant applicants that suggests responses to questions from previous responses the applicant has provided; the AI assistant will display a similarity score to help with decision-making. The applicant can also upload existing proposals to have it auto suggest responses. The vendor reports that AI-generated grant summaries will likely be released later in 2024.

The system is hosted with Amazon Web Services. All data in the system is encrypted at rest and in transit. The entire database is backed up every day, and each backup is held for 30 days. Penetration testing conducted on a monthly basis. The vendor reports that the system is SOC 2 compliant and provides copies of the report on request.

Security & Privacy Overview

- ■ Core Functionality
- ■ Workaround
- ■ Integration
- ■ Not provided
- ■ Premium/enterprise
- ■ Add-on
- ■ Custom dev

Security and Privacy
Access to different parts of the system is controlled by role-based permissions. Five types of users come standard with the system: Admin, Standard, Payments, View Only, and Board. Clients can buy custom permissioning features to create new user types and set more granular permissions. An audit log that tracks user actions in the system is also available at an extra cost. User logins are secured by two-factor authentication; single sign-on is also available.

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Training and Support

	Included	Additional Cost	Not Available
Phone			X
Chat	X		
Email	X		
Knowledgebase	X		
Training Videos	X		
User Community	X		
Implementation	X		

All implementation is included in the cost of the system, and the vendor will continue to make requested changes to your configuration for as long as you use the system. Clients work with an account manager—not only for implementation, but also post implementation.

All support and training is included in the cost of the system. Standard response time for support requests is 24 hours. Chat support is available weekdays between the hours of 8 a.m. and 9 p.m. Eastern, with 10- to 15-minute response times. Email and chat support is available to users of the grantee portal as well.

The vendor provides a knowledgebase and online training videos for clients, as well as regular newsletters. There is a user community, but the vendor reports that is not very active at this time.

Customer Experience Survey
Number of Survey Respondents Using the System: 11
Percent Who Would Recommend the System: 100
Training Rating: 3.95/4
Implementation Rating: 3.95/4
Support Rating: 3.86/4

Appendix A: Research Methodology

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

Eligibility Criteria

Working in collaboration with a working group made up of experts from the funding partners of this report, we began by defining a set of gating criteria to govern the eligibility of software packages for inclusion. As with previous editions, we decided to focus on grants management software for private foundations—we also included Foundation Cloud, which works primarily with community foundations but has a grants management product that met our gating criteria.

Our definition of a grants management system includes only systems capable of managing the full grant cycle, and which are offered as free-standing products rather than part of a foundation "back office" management service. To be included in the report, a system must be able to do the following without customization:

- Track associations between grants and particular programs
- Track organizations separately from individual grants
- Track which requirements grantees have and have not met
- Define a payment schedule for each grant and see upcoming scheduled payments
- Run reports on a variety of system fields

In addition, systems that qualify for the report must include the following features:

- Ability to track entire grant lifecycle, from application through review to award and outcomes reporting
- Customizable online applications and forms
- Online application review/scoring

- Grantee relationship tracking/management (built-in or via integration)
- Document/email generation (built-in or via integration)
- Payment tracking
- Flexible and customizable reporting
- Web-/Cloud-based (or easy remote access)
- Responsive design (accessible across a variety of devices)
- Multi-factor authentication
- To be included, vendors must have a minimum of 30 clients, 10 of which are foundations.

Product Selection

We started with the list of systems evaluated in our 2020 edition. The market has experienced several changes since its publication, with some vendors leaving the grants management space and others affected by mergers and acquisitions. We asked our working group of partners to help us identify additional systems for inclusion; we also received several requests to be included from vendors. We emailed an eligibility questionnaire to all vendors on this expanded list to determine whether their software fit our GMS definition.

Six systems included in the 2020 edition do not appear in this edition:

- **CC Grant Tracker** rebranded as **Symplectic Grant Tracker** and now focuses primarily on research grantmakers.
- Bonterra acquired **Cybergrants**; we made multiple attempts to reach out to the vendor for inclusion, but did not receive a response.
- Saleforce will sunset its **Foundation Connect** product in 2025/2026; we included Salesforce's new grants management product in its place.
- SurveyMonkey did not respond to multiple attempts to include the **SurveyMonkey Apply** product.
- **WebGrants** did not meet our gating criteria related to the number of foundation clients
- WizeHive released a new product that will

eventually take the place of **Zengine**; so we included that product in its place

Four new systems met the gating criteria and were added to the report:
- **Impactfully** by Foundation Source
- **NPact Foundation Cloud** (successor to the Granted GE Spectrum platform included in the 2016 guide)
- **Submit.com**
- **Temelio**

The final result was a list of 14 systems, four of which were making their debut in this year's Consumers Guide.

Evaluation Criteria

Based on feedback from vendors and readers and discussions with subject matter experts, we continued to refine the way in which we evaluate software for this report. This year's evaluation criteria format is similar to the well-received approach we used in our 2022 *Landscape of Integrated Software for Community Foundations* report. Rather than organizing the functionality into a rubric that rates the platform on a scale of "basic" to "advanced," we instead have adjusted our focus to report on how the systems meet the functionality in our rubric.

We also removed basic functionality that all systems handle similarly—for example, creating custom fields and assigning tasks to users—in favor of focusing on areas of likely differentiation between systems in the report.

We divided the rubric into eight sections, with specific functionality listed in each section (see Appendix B for the full rubric). Functionality in seven of the sections is mapped to one of the following statuses:
- This is core functionality available to all clients
- This is core functionality available for premium/enterprise subscribers

- This can be done using functionality designed for another purpose
- This can be done with an add-on or module at an extra cost
- This can be done via a pre-existing integration with a third-party solution [Please identify the 3rd party system(s)]
- This requires custom development
- This is not a feature we provide

In the eighth section, Training and Support, functionality is mapped to the following three statuses:
- This is included at no extra cost
- This is available at an extra cost
- This is not available

In February 2024, we sent vendors a questionnaire asking them to map how their systems met the functionality to the identified statuses. We conducted a series of 90-minute product demos with the 14 vendors selected for this report in March and April of 2024. We then validated vendor responses to the questionnaires during product demos and updated the statuses as necessary.

Finally, we used the revised questionnaires and demos to write up the system profiles, which the vendors were able to review for accuracy.

Customer Experience Survey

Tech Impact and our partner working group developed an updated Customer Experience Survey based on the one used in previous reports that we, along with our partners— Grantbook, PEAK Grantmaking, and TAG— distributed to our email lists in January and February 2024. After we received our initial results, we asked the vendors to distribute the survey to their clients as well. In total, we received 268 responses.

For each system review, we've published how many people reported using the grants management software in the survey. We also include a rating on a scale of one to four based on those users' reported experiences with the

training, support, and implementation offered by the systems' vendors, and the percentage of respondents who would recommend the system to others.

Note: The sample size for many of these systems was very small and, for some newer systems, all responses were from vendor outreach rather than organic submissions. As a result, this survey should not be taken as a rigorously scientific research method. We still felt the results to be useful for foundations considering all factors when making a software selection decision. We've reprinted the content of the survey in Appendix C.

Appendix B: Features Rubric

1. Grant and Application Management

- Grant records
  - ° Easily view related records
  - ° Automated 501(c)(3) status checks
  - ° Automated US Treasury OFAC compliance checks
  - ° Requirements tracking
  - ° Progress reporting
  - ° Grantee portal
  - ° Grantees can update organization data/records
  - ° Grantees can track application status
  - ° Grantees can track payment status
  - ° Grantees can track requirement due dates
  - ° Grantees can upload progress reports

- Online applications
  - ° New applicants can create an account
  - ° Multiple individuals at an organization can have logins/profiles
  - ° Multiple organizations or individuals from multiple organizations can collaborate on an application
  - ° Applications can branch to show different content based on responses to questions
  - ° Multi-stage applications
  - ° Applicants can save their work and return later
  - ° Applicants can duplicate past applications and/or clone existing or closed grants
  - ° Auto-populate applications with in-depth organizational profile data from centralized nonprofit data repositories, such as organization information, program details, financials, impact, and demographics
  - ° Customize application appearance
  - ° Applicants can download full application ahead of time
  - ° Applicants can access and complete application offline and upload/sync to system
  - ° Audio and video file uploads

- ° Upload multiple files to an application
- ° Applicants can download completed applications, including all attachments
- ° Track the time an applicant spends completing an application

- Application review
  - ° Reviewer portal
  - ° Reviewers can download/print full grant application, including attachments
  - ° Reviewers can access and score grant proposals offline and upload/sync to grant record
  - ° Admins can show/hide reviewer comments and scores
  - ° Support multiple scoring schemes

2. Relationships and Constituent Management

- Contact records/relationship management
  - ° Support both individual and organization records
  - ° Organization records can include aggregate demographic information on the organization itself and the populations served by the organization
  - ° Connect with centralized repositories of nonprofit data such as Candid, Impact Genome, or Charity Navigator to import organization information, program details, financials, and impact and demographics data into organization profiles
  - ° Custom relationship types
  - ° Log phone calls, meetings, letters, and emails as interactions on individual and/or organization records
  - ° Easily log interactions conducted via external email programs like Outlook or Google
  - ° Summary view of all interactions and grants for an organization or individual over time
- Communication
  - ° Send email through the system to individuals
  - ° Send bulk emails through the system
  - ° Track email opens and clicks
  - ° Email and letter templates
  - ° Insert custom content from system fields into emails and letters

- ° Personalize or customize individual emails and letters that were created as part of a batch process
- ° Board portal
- ° Surveys and questionnaires

3. Financial Management
- Payments
  - ° Set a default payment schedule for grants
  - ° Create custom payment schedules for grants
  - ° Set up contingent payments
  - ° Automated payment approval
  - ° Batch payment updates
  - ° Securely store ACH/wire transfer information
  - ° Report on scheduled payments
  - ° Accounting module
- Budgeting and forecasting
  - ° Track budgets in hierarchically defined categories or program areas
  - ° Enter a budget amount for each grants program and report on that information with actuals
  - ° View the impact a particular grant will have on future year payouts with a "what if " type feature
  - ° Split grants across more than one program for budgeting purposes
  - ° PRI interest payment tracking
  - ° Forecasting

4. Automation and Integration
- Automation and integration
- Define multiple custom workflows
- Auto-assign reviews based on reviewer workload/availability
- Automated emails
- Pre-built third-party data API connectors
- Integration with Microsoft Word and/or Google Docs
- Open API(s)
- Private API(s)
- iPaaS connectors
- Make batch updates via file upload 5. Business Intelligence and Reporting

5. Business Intelligence and Reporting
- Full system search, including contents of attachments
- Catalog or list of third-party data available for use in reports
- Customizable dashboards
- Customizable dashboards for different user roles
- Individual users can create their own custom dashboards
- Interactive charts/visualizations
- Pre-packaged reports
- Pre-packaged charts/visualizations
- Users can edit pre-packaged reports and charts/visualizations and save them as custom reports and charts/visualizations
- Customized/ad hoc reporting
- Users can create and save custom report templates in a variety of formats (Excel, Word, PDF)
- Summary reporting across grants, organizations
- Report scheduling
- Favorite/categorize reports
- Outcome/impact reporting
- Automatic calculation of progress toward outcome goals using submitted progress reports
- Evaluation of and reporting on outcomes across programs and/or all grantees

6. Technical Considerations
- Accessibility (as defined by WCAG 2.1 guidelines)
- Responsive design for mobile & tablet display
- Defaults to a modern, common taxonomy, such as UN Sustainable Development Goals, Candid PCS, Impact Genome Outcomes, or Geonames
- Users can define custom taxonomy codes or terms
- Predictive tagging of information entered into the system
- Multi-currency support
- All content can be multilingual
- System integrates with online translation add-ons

- Mass data export
- Mass data import
- External data sharing

7. Security and Privacy Considerations
- Customizable user access control/permissions
- Audit log
- Multi-factor authentication
- Single sign on
- Data encryption at rest
- Data encryption in transit

8. Training and Support
- Phone support
- Chat support
- Email support
- Knowledgebase
- User community
- Implementation assistance
- Training videos

Appendix C: Customer Experience Survey

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

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

3. How satisfied are you with your current system?
- 1 Star
- 2 Stars
- 3 Stars
- 4 Stars
- 5 Stars

4. Would you recommend this system to another grantmaker?
- Would enthusiastically recommend
- Would recommend with some reservations
- Would not recommend
- Would actively advise against

Please describe any reservations.

5. Do you anticipate switching from your current system in the next 12- 24 months?
- Yes
- No
- Not sure

6. How well does the system you use support the contemporary grantmaking practices your organization may engage with, such as demographic data collection and analysis; equity- aligned decision making; or participatory practices (including community scoring of applications); etc.?
- Strongly Supports
- Somewhat Supports
- Doesn't Support
- Not Sure
- N/A

7. Do you generally agree or disagree with the following statements regarding vendor support for the system you use?
- It's easy to reach someone to discuss a particular problem or ask questions.
- The people I've reached were able to solve my problem or answer my questions.
- My questions or issues are resolved within an hour or two.
- My questions or issues are resolved within 24 hours.
- The vendor provides useful online avenues in which to research an issue or solution myself.
- The vendor is consistently available and prompt in terms of responding to a question or other need.
- I hear from the vendor about pending updates to the system.
- It is clear to me what is in an update.
- Updates to the system are relevant to our needs.
- The vendor periodically shares a roadmap of planned future features.

8. Do you agree or disagree with the following statements regarding the vendor's implementation of the system you use?
- I was provided with a clear project plan that outlined the timeline and budget for the implementation.
- The implementation of the software went according to schedule.
- The implementation of the software went according to budget.
- It was easy to import our existing data to the new system.
- The representatives of the vendor during the implementation phase were knowledgeable.
- The system delivers on the promises made during the sales process.
- Small issues that arose during the system implementation were resolved within a few days.
- Larger issues that arose during the system implementation were resolved within 1-2 weeks.

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

- Initial training was included in the cost of implementation.
- The training offered by the vendor covers areas of interest to me and my organization.
- The training offered by the vendor is generally helpful.
- The training offered by the vendor is generally easy to understand.
- The training offered by the vendor is generally easily accessible.
- In general, the quality of the training offered by the vendor is worth what we pay for it.

10. About how often has there been a time when you couldn't access the system?

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

11. Are there features you need or would like that are not currently offered by your system?

Appendix D: Additional Resources

Landscape of Integrated Software for Community Foundations, Tech Impact

Advocating for Your First, or Next, Grants Management System, Grantbook

How to Frame Your Grants Management System Selection, CGNET

Comparing and Selecting the Right Salesforce Grant Management System for Your Nonprofit or Foundation, North Peak Solutions (free, registration required)

Drive Equity with Demographic Data, PEAK Grantmaking

Courage in Practice: Principles for Peak Grantmaking, PEAK Grantmaking

Series: The Fundamentals of Trust-Based Philanthropy, Arizona Grantmakers Forum and the Trust-Based Philanthropy Project

The Strategic Value of Trust-Based Philanthropy, Stanford Social Innovation Review

Common Grant Application Questions Shared Across Funders, Technology Association of Grantmakers (TAG)

Responsible AI Adoption in Philanthropy, Technology Association of Grantmakers (TAG)

10 Ways Funders Can Address Generative AI Now, Stanford Social Innovation Review

Guide: Starting Your Grantmaking Data Visualization Journey, Grantbook

Webinar: Accessibility is Not Accessible, Tech Impact

The Grant Manager's Guide to Building Accessible Forms, Good Grants

Appendix E: About This Report

Authors

Amadie Hart, Lead Researcher

Amadie Hart is a contract writer and researcher for Tech Impact and president of Hart Strategic Marketing LLC. She has a wide range of experience helping nonprofits assess their needs, select software to meet them, and engage audiences and constituents. She has extensively researched a wide range of nonprofit technology topics, including donor and grants management systems, project management tools, social media decision-making, and digital literacy, and brings her experience and expertise with organizations of all sizes and missions to bear on our work.

Chris Bernard, Editor

Chris was previously the managing editor for Tech Impact and the editorial director for Idealware, in which capacity he worked on every past edition of this guide as well as a wide range of other nonprofit technology publications. Currently he's the managing editor of eWeek magazine, where he oversees a team of writers covering a wide range of enterprise technology topics, including AI.

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Peter is a senior consultant at Tech Impact. His work with nonprofits includes developing technology plans, acting as virtual CIO, guiding application selection projects and coaching nonprofits in their use of Salesforce.

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This report would not be possible without the input, expertise, and effort of our working group:

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About Tech Impact

Tech Impact is a nonprofit that leverages technology to advance social impact. Our proven workforce development programs deliver highly impactful IT and Customer Service training that foster individual growth, economic mobility, and a more diverse talent pool. Through our full-spectrum technology services, we support nonprofits with the expertise, support, and resources they need to use technology to deliver greater impact and help their communities thrive.

About Grantbook

Grantbook is a strategic tech consultancy exclusively serving philanthropy. We help grantmakers like you transform and optimize your change operations—the suite of people, process, data, and tech that empowers changemakers around the world to achieve their full potential.

Whether you're a private, community, government, or corporate funder doing your good through grants, scholarships, donor-advised funds, or impact investing, our team of philanthropy nerds will help make your 'how' less burdensome, so you and your changemakers can feel more connected to your 'why.'

At the end of the day, choosing to work with Grantbook is about much more than implementing systems, or tapping into best practices from your funder peers around the globe. It's about investing in people—both your people and the changemakers you serve—so you can harness the catalytic power of operational excellence and maximize daring change, together. Ready for a better way to do good?

About PEAK Grantmaking

PEAK Grantmaking is a vibrant, growing community of philanthropy professionals coming together to transform philanthropy through equitable grantmaking practices. Our core membership of grants management professionals is uniquely positioned to lead the way as change agents and influencers for internal practice changes that best support nonprofits and see them as true partners. Learn more at peakgrantmaking.org.

About TAG

The Technology Association of Grantmakers (TAG) cultivates the strategic, equitable, and innovative use of technology in philanthropy. Our work builds knowledge, strengthens networks, and advances the social sector.