

Grants Management Software: Choosing the Right Integrated System for Your Foundation

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Major Grants Management Systems and Services

Costs can range from US \$5k-250k+ depending on modules, number of users, transactions, investments, professional services, etc.

- i Arlington Group
- i Bromelkamp Company
- i CyberGrants
- i Foundation Source
- i MicroEdge/NPO Solutions



Major Commercial Grant Management System Vendors and their Products

Company	Major Products and Services £ = Announced for availability in 2006
Arlington Group	Easygrants and optional modules, ASP version of Easygrants [£]
Bromelkamp Company	First Pearl, Pearl, Community Pearl, Corporate Pearl [£] , Pearl Loan Servicing, and Pearl companion modules
CyberGrants	CyberGrants
Foundation Source	Foundation Source Online, Back-Office, Requests, Client Services, Results [£]
MicroEdge and NPO Solutions	GIFTS, Essential GIFTS and optional modules, MyGIFTS, IGAM, ReviewerConnect, Matching GIFTS, Volunteer GIFTS, GIFTS Plus Pak .NET Extension, PorticoGRM [£] , FIMS, Portico Exec for FIMS [£] , FIMS Chart [£] , FoundationPower, IGAM, Advisor Xpress, Host*Net, Safety*Net, DAF



Different Types of Applications and Services -or- *“What Runs Where?”*

1. Windows Applications

- | Windows software on an internal PC or server
- | Windows software on either internally or a vendor’s hosted Windows Terminal Server or Citrix Metaframe Web server to provide remote browser access

2. Web-based Applications

- | Web-based software on internal servers
- | Web-based software on a vendor’s hosted servers

3. Hybrid Windows and Web-based Applications

- | Windows software internally on servers and Web applications either internally or externally on a vendor’s servers

4. ASP Services

- | Web-based ASP service on vendor’s hosted servers
- | Web-based ASP service on vendor’s hosted servers with professional and back office services

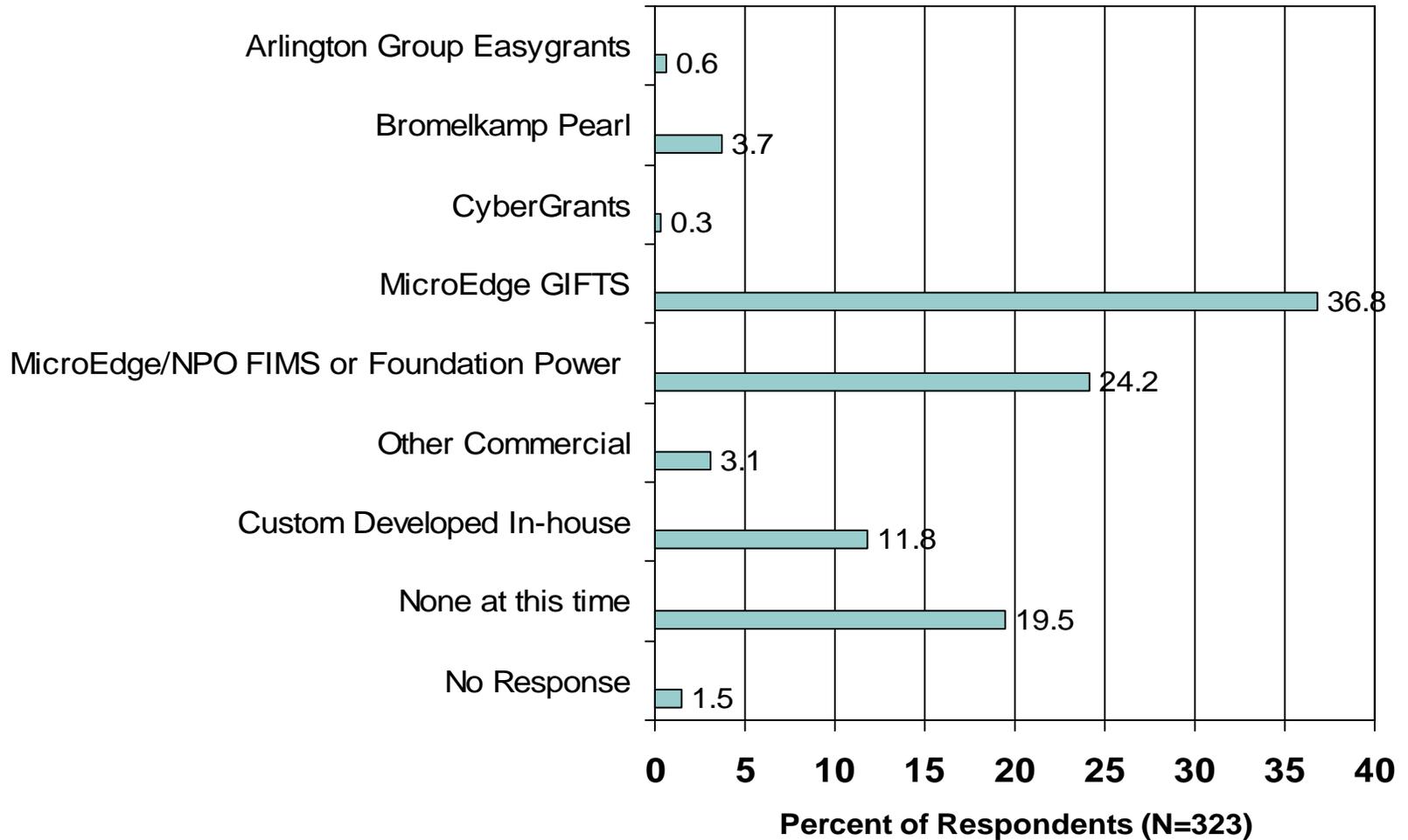


**2005 Grantmakers
Information Technology
Survey Report**

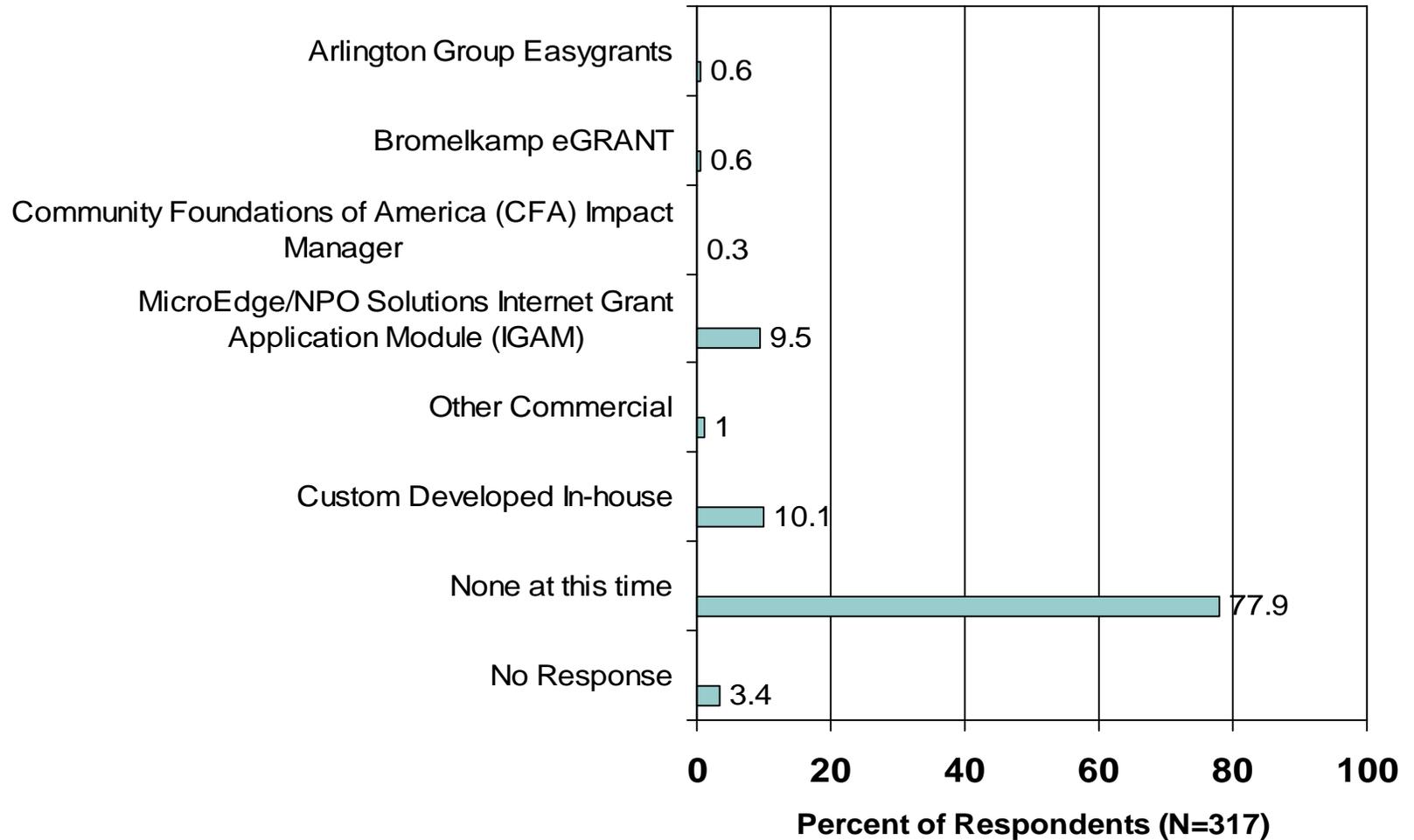
September 2005

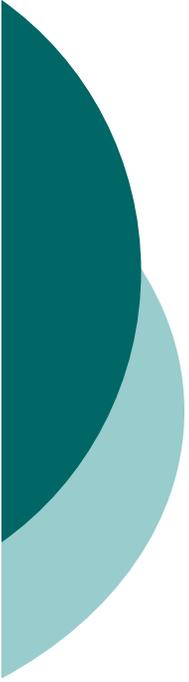
**Prepared jointly by
the Technology Affinity Group and
the Council on Foundations**

Primary Grant Management Software



Primary Online Grant Application Software or Service





Technology Issues That Grantmakers Report Are Most Difficult to Address

1. Online applications/donor services
2. Security
3. Integration of database and grants management software with other applications
4. Technology staffing and training
5. Expansion and maintenance of Web sites
6. Costs of keeping up with new technology
7. Mobile and wireless computing

Key Trends in Grants Management Software and Services

- i Greater stability in GM vendors – less market consolidation
- i Increased demand and availability of more flexible and powerful Web-based systems
- i “Self-service” approach of providing more information and interactive Web-based systems for grantseekers and grantees
 - i Growing use of online applications with eligibility quizzes and document attachments
 - i Online submission of progress and financial reports
 - i Nonprofits maintaining up-to-date contact and compliance information



Key Trends in Grants Management Software and Services

i Demand for greater integration

- l Linking and presenting selected grant information on public Web sites and staff/board portals
- l Use of graphics to improve decision-making and presentation
- l Synchronization with Microsoft Outlook
- l OFAC compliance checking



i Increase in hosted and ASP services with pricing based on variables such as usage, number and amount of applications, grants, etc.

Emerging Technologies and Their Impact on Foundation Systems



New Technologies that Will Impact Foundation Information Systems

- i New products to currently scheduled for released by Microsoft in the next 12 months
 - i Microsoft Office 2007 – new user interface, greater interoperability between Office applications, new XML file format, tighter integration with SharePoint
 - i Windows Vista – with enhanced security and a new user interface
200 million preloaded copies predicted to ship in the first 24 months following release
 - i Microsoft SharePoint v3 workgroup portal software - the centerpiece of Microsoft's new Office application strategy



New Technologies that Will Impact Foundation Information Systems

- i More and faster broadband access (DSL, cable modem, satellite), cellular, and Wi-Fi communications resulting in increased demand for remote access to office information systems
- i Potential for greater system integration using Microsoft .NET and Web Services as the next generation architecture for many vendors of commercial systems
- i Improved development tools that enable more rapid development plus greater modularity and interoperability



Some Key Questions for Foundation Information Systems Decision Makers

Defining Your Requirements

1. How well does your current grantmaking operation meet the goals in your strategic plan? How can it be improved?
2. What are the key capabilities and limitations of your existing system?
3. How complete, consistent, accurate and up-to-date is the data in your current system?
4. Can limitations be overcome by staff training, effective use of existing features, product upgrades, data cleanup and recoding, and/or integration with other applications?
5. Have you developed a detailed list of prioritized system requirements? Everything can't be "required" or "high".



A	B	C	D	E
1	King Baudouin Foundation Integrated Grants Management System Specifications - v8.0			

2

3 IMPORTANT INSTRUCTIONS: Please describe your ability to meet each of our specified system specifications. Please do this by completing the Vendor Response column of this document. When doing this, please be very specific and describe your system's features and capabilities. Enter the number (1,2,3,4) associated with the bolded text in each box followed by additional explanatory information. Please also shade the Vendor Response box with the same color as shown below. The **D** in the first column below indicates those functions that the vendor will be asked to demonstrate.

4 **1** Currently available and is fully functional exactly as described in the latest production version of your product and/or service.

5 **2** Similar but with some limitations compared with what is described. Then clearly describe all limitations.

6 **3** Not currently available and, if shown as "Required" what you propose with a guaranteed delivery date and cost (if applicable) from the date of contract signing. Please clearly specify if your approach

7 **4** Targeted for future integration into the core system exactly as we've described for all clients vs. being specific to us. Please specify the guaranteed delivery date.

8

	Function	Description	Required or Desired 5=high 1=low	Vendor Response
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9

10 LEGEND: Blue =Required attachment **D** In left column = Will be required in system demonstration

11 **User Interface**

12	D Ease-of-use	Windows or Web graphic user interface that has uncluttered screens, facilitates navigation, and functions consistently with other supported Windows applications.	Required	
13	D Full screen display	All screen displays (except pop-up windows) will display full screen regardless of the monitor size and display resolution. Text elements will be designed to fill the screen to make optimal use of display space regardless of screen resolution.	Required	
14	D Keyboard Support	Full support of the Belgium standard keyboard	Required	
15	D Dynamic user interface	Dynamic user interface that displays only those functions and capabilities that users have the rights to access.	5	
16	D Custom designed screens for quick entry	Ability to customize screens by hiding/removing unused fields, to make them required, to customize labels, and to rearrange fields.	5	
17	D Supervisor view	Ability for a supervisor to see the status of all application and grants assigned to selected staff	5	
18	Windows NT/2000/XP workstation	Fully compliant with Microsoft's Windows NT/2000/XP workstation Common User Access (CUA) interface standard.	5	
19	Context sensitive online help	Online help that describes the capabilities of the system. Includes a searchable index.	5	
20	Web interface	The application is Web enabled and is fully accessible and functional via a supported Web browser.	5	
21	Windows interface	The application is fully accessible and functional via a Microsoft Windows interface.	4	
22	Personalized view by user group	Each type of user can be provided with a default startup view that specifies what data is presented and how it is sorted. The presentation of data can be filtered to display only those tasks that are the responsibility of the user. The user can change this at any time.	4	
	Customized user interface	Button bars and pull-down menus that can be customized by the system administrator for individual users and/or groups. Permit adding buttons to launch external applications (e.g. word processor,	4	

Some Key Questions for Foundation Information Systems Decision Makers

Users

6. How many staff will be using the system to do what, how often and from where? (grant managers, administrative assistants, program officers, executives, trustees, grantees, etc.) In the future?
7. What is the level of grants management and computer expertise of each type of system user?



Grantmaking Operations

8. Is your grantmaking operation and workflow similar or different from other organizations? If different, then how and why? How willing are you to change this?
9. How likely is it that your grantmaking operation will change in the foreseeable future? In what specific way(s)?

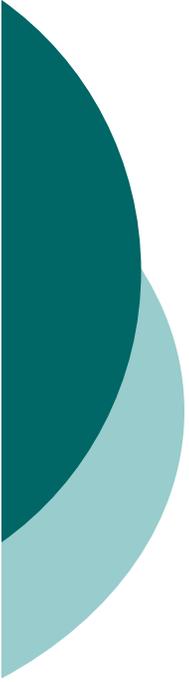
Key Questions for Foundation Information Systems Decision Makers

Integration

10. How do you need to integrate your grants management and other systems? How, why and frequency?

- | Public Web site
- | Foundation intranet/portal
- | Microsoft Word and Excel
- | E-mail
- | Grantee research services
- | OFAC compliance services
- | Accounting system
- | Investment management systems
- | Donor Advised Funds
- | Knowledge management and search engines
- | Document management
- | Others?





Some Key Questions for Foundation Information Systems Decision Makers

Type of System, Platform, Support and Services

11. Can you adapt your operation to an existing commercial off the shelf (COTS) or application service provider (ASP) systems? Do you need a custom designed system?
12. What is your staff's level of technical expertise and availability to install, secure, integrate and provide ongoing support for your systems?
13. What workstation hardware do you use today? PC or Mac?
14. Would you consider or require a system that is hosted externally and accessible via a secure Web browser?
15. Do you need a service bureau that can provide some or all of the professional services to create a foundation and manage the complete grantmaking operation (e.g., legal, accounting, program, compliance, back office administration, etc.)? Which services?

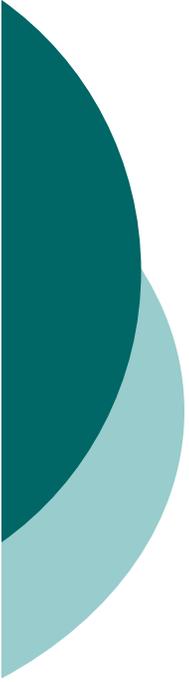
Some Key Questions for Foundation Information Systems Decision Makers

Costs

16. Have you developed estimates for cost related variables that will determine the up front, migration and ongoing cost of the system?

- | Number of individual and concurrent users
- | Number of applications, grants and reviews annually
- | Total foundation's assets under management
- | Volume, completeness, and consistency of data to be migrated and stored
- | Links to different systems





Some Key Questions for Foundation Information Systems Decision Makers

Vendor Background

17. Company, product and support information:

- | How large is their client base? Similarity to your organization? Is it continuing to grow?
- | Company profitability and level of investment in R&D
- | Low staff turnover and expertise with your type of grantmaking organization
- | Use of state-of-the-art technology
- | Level of client satisfaction and responsiveness
- | Training and system documentation
- | User support – availability of support specialists and online user and technical references
- | Service level agreements
(for all hosted, ASP services and service bureaus)
- | Do support contracts include new & improved features?

Some Capabilities of the Latest Generation of Integrated Foundation Information Systems



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- Secure full-featured system that enables cost effective internal use and remote access
- Powerful and intuitive user interface
- Contact relationship management (CRM) with one-to-many relationships
- Grantseekers and grantees can maintain up-to-date organization and contact information
- Web-based application forms with branching eligibility quizzes
- Online proposal review – internal, external reviewers and peer panels
- Document management with viewers and searchable content



Some Capabilities of the Latest Generation of Integrated Foundation Systems

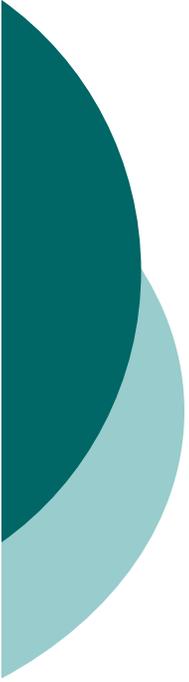
- Conversion of application attachments to PDF format with ID watermarks
- Customizable workflow management
- Integrated Tax ID and OFAC compliance verification
- Dynamic links to GuideStar, Charity Navigator, and Revenue Canada for due diligence research
- Requirement scheduling and tracking
- Online submission of reports
with automatic virus checking of all incoming files
- Program and grant evaluation



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ⌋ Built-in calendar that enables filtering
- ⌋ One-step mailmerge either with Microsoft Word or via a built-in Web application
- ⌋ One-step export to Excel
- ⌋ Flexible ad-hoc query with saved searches
- ⌋ Powerful and flexible report writer plus a library of standard reports that can be modified
- ⌋ Scheduled production and distribution of reports
- ⌋ User defined hierarchical coding structure
- ⌋ User-defined fields and calculated fields





Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ▶ Synchronization with Outlook contacts
- ▶ Personalized interfaces for different users
(e.g., grant managers, program officers, senior management, board members)
- ▶ Selected grant information can be easily linked or exported for publishing on a Web site
- ▶ Database that ensures data integrity
- ▶ Utilities and services that facilitate recoding and restructuring data
- ▶ Collaborative online budget development and tracking



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ⌚ Either built-in check writing/accounting or two-way links to accounts payable packages
- ⌚ Support of either cash or accrual accounting
- ⌚ Systems security and audit trails for key events
- ⌚ Support of foreign characters to record names with accents plus online applications in different languages
- ⌚ Multi-currency conversion for international grantmakers



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- Support of industry standard database formats to facilitate interoperability with other applications
- Professional training and support
- Active user groups, online discussions, presentations and conferences
- Context sensitive online documentation and comprehensive searchable knowledgebase





Time for spirited questions!