Integrated Foundation Information System Hosted
Service Providers and Software in North America – 2013

Vendor (Year of first grant software or service)	Active GM Clients on 1/1/2013	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services added in 2011 and 2012 (In multiple client production in 2012)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
Altum *(1998)* 877-GO-ALTUM 703-657-8299 www.altum.com info@altum.com 12100 Sunset Hills Rd Suite 101 Reston, VA 20190	20 Easy-grants clients 73 proposal-CENTRAL clients 26 Federal clients using PC, EG and other Altum grant related solutions 5 non-US clients (1 PC, 4 EG)	32 staff	Medium-to-large foundations Federal & State government agencies Biomedical grantmaking organizations	Easygrants® (EG) – Program Planning & Management – Fund Source Tracking – Application – Review (internal and/or external; individual & committee/panel) – Grantee Financial and Progress Reporting – Grants Management – Contact Management – Risk Management – Workflow Configuration – Workload Management – Integrated Document Management (SharePoint) – Queries, Reports, Dashboards, BI proposalCENTRAL® (PC) – Application – Review – Progress Reports – Grants Management – Contact Management – Queries & Reports Altum Query Module ® Altum Financial Management and Costing Applications (based on Infor Performance Management) Mobile Applications and website re-engineering for mobile device support	Easygrants – System performance enhancements for faster end user response time and increased scalability – Expanded Review Module to simplify meeting planning and attendance tracking; and scoring and evaluation configuration flexibility – Added more standard data forms with increased form, task and workflow configuration flexibility – CRM and communication enhancements – Added Risk Mgt. module – LDAP Active Directory integration for enterprise single sign-on support proposalCENTRAL – Staff portfolio management – More built in reports – Additional user roles and permission management – Customizable e-mail templates and merge codes – Enhanced financials with carry-forward and budget change tracking – Review process improvements - broader flexibility of evaluation forms; streamlined navigation for reviewers, and robust data and reports for review process analysis – Increased audit control of reviewer confidentiality and conflicts of interest – Streamline online application support for "by invitation only" programs	• Microsoft Word • Microsoft Excel • Microsoft Outlook • Microsoft SharePoint • Foundation Center eGrant Reporting • Report Writers and Business Intelligence Software (e.g., Crystal, Cognos) • Custom links to accounting systems • Custom links to compliance verification service(s) • Custom links to CRM systems, internal authentication systems, and website content • Web services for interoperability with grant and ERP systems	Easygrants is offered as licensed enterprise software with optional hosting or as a SaaS service proposal-CENTRAL is a SaaS service	Web Browser user interface for all systems. Supports all major web browser platforms: Internet Explorer, Netscape, Opera, Firefox, & Safari – on Macintosh, Windows, and Linux/Unix clients Architecture is predominantly Microsoft-based technology – .NET, IIS web server, SQL Server database, SharePoint document management. Interfaces via open standards: .XML; Web services; SOAP

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Bromelkamp Company LLC *(1979)* 888- 290-9087 www.bromelkamp.com info@bromelkamp.com 106 East 24th Street Minneapolis, MN 55404-3522	228 total clients 226 U.S. clients 2 Intl. clients	14 staff	Community foundations Corporate foundations Family foundations Operating foundations Private foundations Government grantmaking agencies	• Akoya.net (online grants, CRM) • First Pearl (grants, CRM) • Corporate Pearl (grants, CRM, matching gifts, dollars for doers, event tracking) • Community Pearl (grants, CRM, fund accounting, fundraising) • eGrant.net (online grants application management tool) – online applications and reporting – scholarship applications – paperless scholarships (online references and transcripts) – online review – moderated review – Application Status – Builder (designer) – Fundweb.net (online donor statements & grant recommendations for Pearl or FIMS) • Pearl Companions – Pearl Geocoder – Pearl NCOA (National Change of Address database) – Pearl ACH (direct deposit of grants and/or donor pledges) – Pearl Outlook Updater – Scan to Chronicle – Pearl Web Collector/Reporter – Bridge to QuickBooks or Peachtree accounting • Pearl Loan Servicing (for PRI's) • Pearl (custom)	• eGrant.net Moderator (media review in a controlled panelist environment) • eGrant.net Builder • eGrant.net Branch Logic • eGrant.net Reviewer on the iPad (testing) • eGrant.net Reviewer standard reports (piloted) • eGrant.net re-design of end user interface (testing) • Community Pearl Enhanced Budget Report (piloted) • FundWeb.net for FIMS	• Microsoft Word • Microsoft Excel • Microsoft Outlook • GuideStar • Electronic grant reporting to the Foundation Center • MapQuest • Google • ChoicePoint Bridger Insight for compliance verification • QuickBooks • Peachtree • Intacct • Citrix MetaFrame • FIMS (import from eGrant.net, integrate with FundWeb.net)	Licensed software Optional hosted via Windows Terminal Server or Citrix Server Fundweb.net (donor statements and grant recommend-ations on the Web) eGrant.net online applications and reports Akoya.net online grants management/ CRM	VB/VB.Net running on Windows 98/NT/2000/XP/ Vista/Windows 7 Microsoft Access database versions 97/2000/XP/ 2003/2007/2010 SQL Server Sybase Microsoft Dynamics 2007/2010

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closerware
 	
Closerware *(2005)*
 	
203- 987-3339
www.GrantMaker.com
 	
sales@closerware.com
 	
4 Daniels Farm Rd #368
Trumbull, CT 06611
	28 U.S. clients	6 staff	Private foundations
			
			Family foundations
				• GrantMaker
				  – Apply - Publish any number of online application forms for your grants.
				  – Centralize - Organize all of your applications and awarded grants in an easy-to-access web database.
				  – Evaluate - Provide each of your evaluators with a unique login to securely review and download pending applications.
				  – Communicate - Evaluators post ratings and comments for each application. Administrators provide feedback to applicants.
				  – Award - Run aggregate reports on evaluator ratings and comments. Convert applications to awarded grants. Track post-award requirements and deliverables.
					• Added an "Application Reviewer Rating Values Matrix" report to view all individual reviewers' scores, per rating question, on an application.
					• Made easier to filter the opportunities, and provided more filter options.
					• Improved layout of the Grant Application view for reviewers.
						Product offers reporting and exporting utilities to extract any/all data into a CSV format to share with any outside application.	SaaS Includes 24x7 hosting, monitor, maintenance, data backups, security encryption, feature upgrades, training, and unlimited help desk support via phone and email.	Entirely web based.
								
								Applicants can use any browser on any platform.
								
								Administrators can use:
								
								On PC: Internet Explorer 5.5 or higher, or Firefox 0.8 or higher.
								
								On Macintosh and Linux: Firefox 0.8 or higher.

COMMON GRANT APPLICATION **Common Grant Application** *(2008)* A project of Oceanpeak, Inc. (310) 451-7520 *info@commongrantap plication.com* *www.commongrantap plication.com* 530 Wilshire Blvd, Suite 207 Santa Monica, CA 90401	13 U.S. grant-making clients	3 staff	Private foundations Public foundations Family foundations Community foundations Giving circles	Common Grant Application grant management system and online application	• Provide custom grantmaker videos to teach grantseeker's and evaluator's how to use the system. • Additional types of evaluation matrices. • Allows grantmakers to require grantseekers to provide the name and other information about their grantmaker sponsor. • Automatically update application with information from IRS Master Business File. • Now being used for scholarship and product donation programs. • Grantseekers can now upload or link video, audio	Data can be imported from and exported to other applications using CSV, Excel files. Encoded links to GuideStar and other charity checking sites. Built-in support of Foundation Center eGrant Reporting	Our hosted ASP service in Dallas is backed up to another offsite facility every evening	The service is based on LAMP (Linux, Apache, MySQL, PHP) technology but all a user needs to use the service is a Web browser (since it is an ASP service). We explicitly support Internet Explorer 4.0 and later, Firefox 1.0 and later, Safari 3.0 and later. We have not had any reported issues with

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					or image files as part of the application or grant report. • In addition to our own document management we now support Google Docs and Google Drive. • Display geographic location of the grantseeker organization and program. • Support quick response (QR) code in printed applications to allow easy return to online application. • Specify types of questions and maximum answers are configurable. • Grantmaker can upload grant report templates to be used by the grantseeker. • Additional contacts on the application. • Improvements to layout and organization of pages.			Chrome and Opera. We also test against tablets.
CSDC GRANTIUM GRANTS SOLUTIONS **CSDC Systems** *(1988)* *(888) 661-1933* *www.csdcsystems.com* *d.mallory@csdcsystems.com* *1705 Tech Avenue Suite 1 Mississauga, ON L4W 0A2 Offices in: Ft. Worth, Ottawa, Washington, Toronto, Vancouver* *Solution partners: CGI Federal Solutions Deloitte Hosting.com Managed*	24 total clients 10 U.S. clients 14 Canada clients	50 grants staff 160 total staff	U.S. State and Federal Government Canadian Provincial and Federal Government Municipal Government Large foundations Scholarship organizations Banking organizations	• Grantium™ Enterprise Grants and Scholarship Management Software o *Front Office* – public facing applicant portal accessible via web browser to where applicants find funding opportunities, register profiles, submit applications, receive status updates, receive notifications and correspond with project staff o *Program Office*-all functionality required by program staff to support grant and scholarship program administration including: – Intake – Evaluation – Award – Project Monitoring – Project Closeout o *Reviewer Portal* –	• WCAG 2.0 Level AA compliance for front office portal • Multi-column reference table lookups • Bulk evaluation • External reviewer portal • Enhanced audit capabilities • Import from Excel • Advanced project evaluation, scoring, and ranking • On-demand post award submissions • Segregated user management • Front Office groups and registrant security • Support for parent and associate applicants • Ability to define brand/style templates to Front Office portal	Grantium™'s Back Office provides extensions points for integration with a wide variety of 3rd party software, subscription services and databases. API's are included as part of core Grantium™ software and permit bi-directional exchange of data via web services and XML. Commonly supported integrations include: • Grants.gov • Data warehouses, 3rd party reporting tools, Business intelligence software (e.g. Crystal, Cognos) • Authentication	Grantium™ is offered as Licensed Enterprise Software With optional SAS-70 approved hosting services in both the U.S. and Canada	Fully Web based using Java EE development platform Major Web browsers supported Include: IE 8.0,9.0 Firefox 5-15 Safari 5.1 Chrome 10-19 Application Server - Deployable with any J2EE 1.4 compliant application server (In early 2013, Grantium will move to a Java 6 EE platform) Database Server

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Hosting				provides a portal for reviewers and subject matter experts that are external to the program office organization ○ *Back Office* – provides extension points for integrations and customizations • Grantium™ Business Intelligence ○ Standard reports ○ Professional custom reports ○ Ad-hoc reports ○ Dashboards		integration toolkit LDAP & Active Directory • Financial System integration toolkit i.e. SAP, Momentum, PeopleSoft • Document Management Integration toolkit • Custom scoring and evaluation algorithms • XML-based data import from legacy systems		- Certified with Microsoft SQL Server 2008 and Oracle 11gR2 Grantium™ includes a built-in Data Mart Builder component to transfer Grantium™ data into a format for reporting for storage in the Grantium™ Data Mart
CyberGrants *(1999)* (978) 824-0300 www.cybergrants.com sales@cybergrants.com *300 Brickstone Square, Suite 601 Andover, Massachusetts 01810*	300+ U.S. clients	65	Foundations: Corporations: Corporate foundations and giving programs Government Private philanthropies	CyberGrants Grants Management System • Online prequalification, application submission and impact reporting • Automated proposal routing and approvals • Role-based dashboard and graphics display • Automated payment processing, check cutting, bank account management /fund stewardship • Ad hoc reporting, scheduling • Correspondence management CyberGrants Employee Giving Platform • Global matching Programs (including cash, in-kind, foreign currency) • Disaster Relief/Special Event matching programs • Volunteer Grant/Dollars-for-Doers • Payroll deduction programs (including UW, PAC matching) • Credit-card donation • Volunteer event, enrollment and roster management	CyberGrants provides its additional software capabilities to all clients as features of its grants management and employee giving systems. • One-click ad hoc reporting • Portfolio summary reports, charts and graphs exportable to PDF • Sandbox/Push-to-Production environment • Role-based dashboards • Mobile application and approvals. • Enhanced Employee Giving UI • Bank account stewardship and fund disbursement (available optional service)	• Any commercial accounting or HR system with abilities to import data. • Microsoft Office • Single Sign-On (SSO) integration tools such as PingFederate, SiteMinder • Integration with other systems (commercial and native) via feeds, API's, etc available as custom development • Foundation Center eGrant reporting • ACCP grant reporting (in development)	100% Hosted platform Hosting facility (NaviSite) SSAE 16 certified CyberGrants SSAE 16 SOC 2 Certification in process (4Q 2013 estimated)	Enterprise-class Oracle platform Oracle 11g (database, reports) Sun Solaris 10 (OS) Supported browsers: IE 7+ Firefox 3.6+ Safari 5+ Chrome

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Dulles Technology Partners Inc. (DTPi) *(1999)* 703-623-2128 www.dullestech.com info@dullestech.com 817 Larch Valley Ct. Leesburg, Virginia 20176	40 clients	8 staff	Federal government State governments, Local governments Cities Universities Foundations Research organizations	• WebGrants product is designed to support grantors, organizations that give away grant money on a competitive and formula basis. • WebGrants Subscription product is intended for smaller grant giving organizations. For organizations that give away less than $5,000,000 per year	DTPi developed the following new features: • New Scheduled Payment Process - Staff can define a global schedule for a single program, for example to pay a grantee $1,000 per month for the next 12 months. WebGrants will automatically setup these payments in advance and process them when the scheduled pay date arrives. • WebGrants supports both built-in and ad-hoc reports. Ad-hoc reports are designed and created by your staff. Reports can be exported to Excel, Word, PDF, HTML and CSV formats. • WebGrants comes with powerful system configuration tools that allow your staff to extensively customize and configure your system. Your staff can create new forms, edit existing forms, add fields to forms, create drop downs, configure email alerts, add new programs and agencies, and create new security roles.	• Exports data to HTML, PDF, Word, Excel, CSV • Data can be imported or exported via XML gateway or flat file • Capable of doing OFAC lookups • Integration with financial and/or automated payment systems possible • Integration with central security service (LDAP, Active Directory, etc.) possible • Most application servers supported including: JBoss, Weblogic, iPlanet, WebSphere, etc.	ASP hosted	Based on Java (J2EE) platform technologies Most relational database management systems are supported including: MySQL, Oracle, SQL Server, DB2, etc. Most server OS including: Microsoft Windows, Mac, UNIX, Linux, etc. Web browsers supported including: Internet Explorer, Firefox, Safari, Opera, Chrome, etc. Most web servers supported including: Apache-Tomcat, iPlanet, etc.
Fluxx formerly Solpath *(2010)* www.fluxx.io info@fluxxlabs.com Twitter @jasonricci (855) 358-9946	42 total clients 35 U.S. clients 7 Intl. clients	13 staff	Private foundations Community foundations Non-Profit organizations Corporate foundations Medical Research Government Agencies	• Fluxx.io - cloud based grants management platform (Grants Management, CRM, Workflow Engine, Budgeting, Scenario Planning, Reporting, Visualizations, Document Management) • "Fluxx Labs" offers consulting services to help streamline and automate critical path process flows in grants management – from	• Native iOS app for iPad and iPhone • Browser-based compatibility for tablet and phone viewing • Enhanced visualizations • GeoTree and Google Map integrations • Google authentication and Google Docs integration • Universal Search • Workflow Engine Upgrades • Grantee Portal Upgrades • Signals internal social	• Excel data export • Auto feed to Foundation Center's eGrant Reporting via hGrant standard • GuideStar Charity Check • OFAC • Microsoft Exchange/Active Directory • Salesforce • NetSuite real-time	Fluxx.io is cloud-based hosted application, running on the AWS platform.	Rails 3 and MySQL on the server side. jQuery on the frontend. Cross-platform and web-based. Supports Chrome, Firefox and Safari. Windows and Mac clients also available for

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567 Sutter Street San Francisco, CA 94108				initial request all the way through disbursement and reporting.	network • Email Queue • Digital Signatures and Approvals • Automated OFAC Checks • Bulk Record Updates • Multi-Currency support with live feed integration for exchange rates • Drag and Drop Form and Workflow Builder • Custom "Dynamic Cards" allows tracking of any structured data within Fluxx • External and Internal Reviewer Portal • Advanced Roles and Permissions Management	sync • Intacct real-time sync • MailChimp • Docusign • Import/Export to any financial system • API/SDK allows integration with any system or service • Microsoft Office		viewing outside of web browser. iOS app available in Apple App Store. Android app coming soon.
Foundant Technologies *(2007)* 877-297-0043 www.foundant.com info@foundant.com P.O. Box 11888 Bozeman, MT 59719	420 total clients 414 U.S. clients 6 Canada clients	17 FTEs (14 full-time + 7 part-time)	Family foundations Private foundations Community foundations Arts & Humanities funders Corporate Giving Programs Scholarship Organizations Research & Fellowship Industry Associations	• Grant Lifecycle Manager v3.2(GLM) • FaxToFile optional add-on • GuideStar Charity Check Web Service optional add-on • Custom Reports • Custom PrintPackets • Migration/Import of historical data optional professional service	• 19 upgrade releases in 2011-2012 (each release includes new features, technical refactoring and bug fixes) • Additional batch process capabilities including Decline and Close • Enhanced PrintPacket functionality for key reports such as Application, Organization Summary, etc. • Ability to customize PrintPackets per client as a professional service • Complete replacement of reporting technology for building ad hoc & saved reports • Ability to customize reports on a per client basis as a professional service • Improved contact tracking with separate details for applicant, executive and organization • Auto-save of draft applications for applicants • Archiving of old online forms and workflows • Optional display of request status for Applicants	• Mail merge to Microsoft Word • Export data to CSV/Excel • Generate reports in Word, Excel, PDF, HTML formats • CSV data exports used as import source for financial systems such as FIMS • Web Service connection to GuideStar Charity Check for automated lookup via EIN • Built-in support of Foundation Center eGrant Reporting • Import historical data via Excel template • Special tool for import of historical data from GIFTS databases	ASP standard for all clients	All Web browser interface supporting Internet Explorer Firefox, Chrome and Safari on desktop, tablet and smartphone platforms Hosted MySQL database backend

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					• Many user interface, terminology & navigation upgrades • Migrated entire hosting infrastructure to Rackspace for increased performance & capacity • Released online client community & knowledgebase • 1st National User Conference with 70 attendees in Sept 2012 • Local user groups established in 14 cities in US			
Foundation Source *(2001)* 800-839-0054 www.foundationsource.com contactus@foundationsource.com 55 Walls Drive Fairfield, CT 06824 Field offices in: Atlanta, Boston, Chicago, Denver, New York City, Philadelphia, Salt Lake City, San Francisco, Seattle	1109 U.S. clients	103 staff	Private Non-operating foundations Family and donor-led foundations Profession-ally staffed foundations Corporate foundations	Provides a full range of services and tools to establish and administer private non-operating foundation and grantmaking programs. • Foundation Source Back Office® including Tax Preparation and Filings, Disbursement Processing and Financial Books & Records • Foundation Source Client Services™ • Foundation Source Online® • Foundation Source Requests® • Foundation Source Results®	Charity Database: • Fully automated monitoring process which updates the FS Charity Database within hours of an IRS Business Master File change to ensure Charity information always is up-to-date. Enhancements to FS Requests® and FS Results®: • Improved functionality related to the ability to schedule Reports from Grantees • Ability to consolidate User Defined Fields and standard application fields into a single view • Introduction of Calculated fields and functionality which can be used to rank and evaluate grant applications • Streamlined functionality to make grants to individuals directly from FS Requests applications Enhancements to Foundation Source Online®: • Personalized home page enabling Foundations to display mission, logo, photos, notes, etc. • Enhancements to standard	• Advent Custodial Data Services • GuideStar • Charity Navigator • ChoicePoint Bridger Insight for compliance verification • Reporting module with output to HTML, Microsoft Word, Excel and PDF formats.	ASP standard for all clients	Underlying technology platform is a hosted, three-tiered application built on IBM DB2 and MS SQL Server databases All Web browser interface supporting Internet Explorer Firefox and Safari (Macintosh) - all require 128-bit encryption

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					Grant and Financial reports • Enhancements to lists to expand/collapse groups, new filtering options and the ability to save defaults views			
Fusion Laboratories *(2004)* 214-739-5454 www.GrantedGE.net www.Fusionlabs.net mhall@fusionlabs.net 5420 LBJ Freeway Suite 850 Dallas, Texas 75240	70 U.S. clients	24 staff	Community foundations Corporate foundations Private foundations Faith Based foundations Philanthropic Service Providers	• GrantedGE • "Proffer" Online • SPECTRUM integrated back-office and online • Gemini (small foundations) • IT Assessments and Strategic Planning • Custom Software and Web Development • Managed Services (hosting)	• Enhanced scholarship processing • Online application review and evaluation • Enhanced Reporting • Advanced Workflow • Processing of Grant Loans • User Defined Field Calculations • Enhanced Designated Grants Processing • Fully integrated online/back-office product • Enhanced processing of encumbered grants. • Improved imports of funds, constituents, grants... • Creation and publication of online applications including HTML edits.	• Microsoft Word • Microsoft Excel • Microsoft Outlook • Microsoft Reporting Services • Adobe PDF forms • GuideStar • Crystal Reports • Blackbaud Raiser's Edge • Blackbaud Financial Edge • Blackbaud NetCommunity • QuickBooks • Built-in support of Foundation Center eGrant Reporting	Licensed Enterprise Software Running either on client servers or via Terminal Services and Citrix on hosted Fusion Labs or Blackbaud servers	Windows 32-bit, 64-bit servers Windows XP, Vista, Win-7 VB.Net MS SQL Server 2000, 2005, 2008 Support standard browsers incl. IE, Firefox and Safari
GivingData *(2009)* (617) 500-3399 www.givingdata.com info@GivingData.com PO Box 300736 Boston, MA 02130	8 clients	2 staff	Any MicroEdge GIFTS client: Private foundations Family foundations Philanthropic advisors	GivingData is an add-on data service solution for MicroEdge GIFTS and GIFTS Alta. • Dashboard (grant approval and payment tracking for executive, program, grants management, and finance teams) • Budget Manager (budget tracking fully integrated with the Dashboard module) • Visualizer (interactive, visually rich reporting engine) • Custom GIFTS Reporting Module • Grants Publisher (publish GIFTS data to the Web) • Professional services including third party software and data	• Pre-GIFTS grants data management for early stage/thinking grants fully integrated with GIFTS data. • Integrated Grant Approvals and Payment Dashboard. • Outcome measurement views. • Percentage allocation reporting. • Map views and full grantee geocoding. • Quarterly and monthly dashboard views. • User management and roles based permissions. • Exportable charts	• Turnkey GIFTS integration • GIFTS document integration. • Data Integration Services – Foundation Center hGrants and U.S. Census. • Link to GuideStar. • SharePoint • Export to Excel • Custom data integration with accounting platforms.	Cloud hosted or on-premise installation.	Microsoft .NET and Microsoft SQL Server. No software to install. Entirely browser-based. iPad and Tablet support.

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				integration, product customization, consulting and other data services.				
Good Done Great *(2009)* 855-DO-GOOD5 (855-364-6635) *www.gooddonegreat.com* 2910 N 28th St. Tacoma, WA 98407	59 U.S. clients Includes 2 state-level affiliate systems with 96 Com-munity Found-ations	16 staff	Community foundations Private foundations Family foundations Corporate foundations	• GDG Online Grant Management • GDG Online Scholarship Management • GDG Volunteerism Tracking • GDG Matching Gifts • GDG Sponsorship Tracking	• All new, modern user interface on new Mission.do platform *(50 on the new Mission.do platform and 9 on the older Intuit platform)* • New easier to use applicant and reviewer portals • Advanced customizable workflows for managing the entire philanthropy process • Support for grants to individuals • Various review process options for private and family foundations to meet any workflow in addition to volunteer reviewers	• Mail merge to Microsoft Word • Export to Excel • Import/Export via CSV, XML, txt • CSV data exports to FIMS, GIFTS, Blackbaud (RE/FE/GE), other financial and/or 3rd party systems • Built in integration with Grantr.com for IRS verification • Free and open API for integration with any other software	100% Internet-based cloud solution on GDG's Mission.do platform TRUSTe Cloud Certified and Comodo HackerProof Certified	GDG's Mission.do online database platform User Interface and programming done using native Mission.do interface. Technology enhancements can be done with simple JavaScript. Support all major browsers (IE, Firefox, Chrome, Safari, Konqueror, etc.)
GrantStream *(2000)* 905-339-3852 *www.grantstream.com* *info@grantstream.com* 1540 Cornwall Road Suite 204 Oakville, Ontario CANADA	70 total clients 63 Canada clients 3 – U.S. + multiple U.S.-based users 3 – UK 1 – Nether-lands	30 staff	Corporations and corporate foundations	GrantRight® Grant Management Technology • Dynamic multilingual application forms with different streams (e.g. events, projects, signature programs, etc.) • Dynamic status notifications to applicants • Notification and auto-assignment of regional/business unit users for recommendations, decentralized approval • Simple-to-use Management Interface for evaluation, decision-making, approval workflow, flexible reporting • Auto-follow up for post-project evaluation MatchRight® Employee Engagement Programs	• New easier-to-use Management Interface layout • Weekly "to do" lists sent to users automatically • Summary charts • Improved application form engine Planned for 2013 • Enhanced evaluation and post-project measurement • New workflow management tool	• Solutions for SAP, EZ Buy and Oracle • IRS charity database • UK charities database • Canada Revenue Agency database	Hosted ASP solution only. Secure class A data centre in Toronto, Canada	Web-based application only with data transmitted using 1024-bit Secure Socket Layer (SSL) encryption Runs under Zend® Server (Apache+SSL 2.2.x, and PHP 5.x), an enterprise PHP platform on Red Hat Enterprise Linux, with a Microsoft® SQL Server® 2008 running on Windows Server® 2008. Supported

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				• Matching gifts • Volunteer grants • Disaster relief matching • Pledging campaigns (e.g. United Way) • Volunteer Event Management (company, NPO Partner and employee-inspired activities) with online registration, guest lists, etc. Custom applications forms; Configurable Management Interface.				browsers for application form (front end): • Internet Explorer 7.0+ • Firefox • Opera 7+ • Google Chrome • Safari 2+. Supported browsers for management interface (back end): • Internet Explorer version 7.0+.

MicroEdge
 	
MicroEdge, LLC *(1985)*
 	
800-899-0890
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info@microedge.com
 	
619 West 54th Street, New York, NY 10019
 	
Announced 10/1/2009 acquired by Vista Equity Partners.
www.vistaequitypartners.com
 	
Minority equity investment in 12/2012 by Bregal Sagemount
www.bregalsagemount.com
 	
Additional R&D, service and support offices in:
	More than 2,400 clients
	
	200+ int'l in 30 different countries
		149 staff	Private foundations
			
			Corporate foundations
			
			Family foundations
			
			Operating foundations
			
			Community foundations
			
			Financial institutions
			
			Attorneys / CPAs
			
			Service Bureaus
			
			Research Organizations
			
			Religious and University Endowments
			
			Government grantmaking agencies
				• GIFTS 6.4
				• Essential GIFTS 6.4
				• GIFTS Optional Modules
				  – GIFTS Plus Pack Core
				  – MyGIFTS
				  – Internet Grant Application Module (IGAM)
				  – ReviewerCONNECT
				  – Matching GIFTS
				  – Volunteer GIFTS
				  – Document Manager
				  – AP Module
				  – Branch Security
				  – Budget Module
				  – Customizer
				  – Import Module
				  – Reviewers Module
				  – Check Writer
				  – Foundation Center Export Tool
				  – System Developer's Kit (SDK) that's an API
				– *GIFTS Alta 1.5 (1Q2013)*
				– *GIFTS Alta Blueprint (1Q2013)*
				• GIFTS Online 4.0 (1/17/2013)
				  – Online applications and reporting
					GIFTS 6.4
					• Improved email correspondence
					• Flexible searches
					• Improved reviews with ReviewerCONNECT
					• Percentage coding
					• Add secondary staff to Requests
					
					GIFTS Plus Pack 5.2
					• Search for requests by IGAM application ID
					• Set default matching options
					• Assign Secondary staff members
					• Attach printed letter templates
					• Search for Secondary Tax Status
					• Divide payment amounts equally
					
					IGAM 5.0
					• Improved formatting capability, flexibility for forms
					• Deactivate forms @ date/time
					• Provide grantees with more info – request, reporting,
						GIFTS / GIFTS Alta
						• Microsoft Word 2003-2010
						• Microsoft Excel 2003-2010
						• Microsoft Outlook (MAPI, SMTP)
						• GuideStar
						• Foundation Center eGrant, hGrant reports
						• Canada Rev Agency
						• Windows 7 SP-1, Windows XP SP-3
						• Microsoft SQL Server 2012, 2008, R2, Exp, 2005 SP-3, Oracle 10g, 11g
						• Citrix XenApp 6
						• Windows Term Server 2008, SP-2
						• Crystal Reports X, XI
						• Great Plains 11, Quicken, QuickBooks, SAP, AccPAC Plus, Acuity, Blackbaud AP,
							GIFTS, FIMS and Foundation Power all licensed software
							
							Hosted for:
							
							IGAM, DonorCentral,
							
							FIMS Host*Net, FIMS CRM,
							
							GIFTS Online
							
							AngelPoints
								GIFTS and Essential GIFTS - VB running on Windows 2000/XP/Vista/ Windows 7 Available in Microsoft Access, Microsoft SQL Server and Oracle server databases
								
								Web browser interface for IGAM and Reviewer CONNECT – supporting Internet Explorer, Safari, and Firefox all with SSL
								
								GIFTS Plus Pak - .NET
								
								GIFTS Online
								– Microsoft Silverlight, VB/ .NET,
								Microsoft

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Edina, MN
 	
Field offices throughout the US
 	
Distributors in the UK and Australia
				– Budget
				– Internal reviews
				– External reviews
				– Branch security
				• AngelPoints – Volunteering, Giving & Sustainability
				• Foundation Information Management System – FIMS
				  – DonorCentral
				  – FIMS CRM
				  – IGAM Grants
				  – IGAM Scholarships
				  – FIMS Online Fundraising
				  – FIMS Host*Net and Safety*Net
				  – AP and GL
				  – Scholarship Management
				  – Pledge, Donor Relations & Gift Management
				  – FieldMaker
				  – Pooled Investment Allocation
				  – Stock Gifts
				  – Donor Advised Fund
				  – FIMS Chart It
				  – Financial Institution Interface Import Tool (with AST Trust Co.)
				• FoundationPower™ Custom System
				  – IGAM
				  – DonorCentral
				  – Portico Exec
					payment status
					• Branching eligibility quizzes
					
					GIFTS Alta 1.0, 1.1
					• Improved user interface and usability
					• Configurable workspaces
					• User-defined, custom-configured dashboards
					• Dashboard web clippings, export, unique views
					• Improved searching, Quick Find, Complex, Saved and Pinned searches Percentage coding
					
					GIFTS Online 2.7 – 3.3
					• Improved User interface, simplified navigation, ease of use
					• Customizable dashboards
					• Carry branding throughout: portal & forms
					• Provide applicant with more info – request, reporting, and payment
					• Create and edit letter templates
					• Quick Find and Complex searches
					• Batch updates
					• Integrated Tax Status and Watchlist checks
					• Percentage coding
					• Code tables management
					• Accounts / Payable integration
					• hGrant reporting
					
					AngelPoints 2012.1 – 2012.9 updates:
					• Improved workflow, usability for setup pages
					• Causes, Skills, Group Categories
					• Full Accessibility for Disabled Users
					• Enhanced interface
					• Top 10 Organizations
					• Automatically log volunteer
						• Blackbaud, Financial Edge, Lawson, MIP, Oracle, Financials, Solomon IV
						• Oracle 11.2
						• IE 7-9, Firefox, Safari, Chrome
						• Terminal Services
						• API for GIFTS
						
						GIFTS Online
						• Microsoft Word 2003-2010
						• Microsoft Excel 2003-2010
						• Silverlight
						• IE 8, 9, Firefox for Windows & Mac, Chrome, Safari for Mac
						• Adobe Reader
						• iPad
						• Win 7, Office 2012 requirement for SP1
						• Web service API for A/P processing
						
						GIFTS/ GIFTS Alta/ GIFTS Online
						• Attus Tech, OFAC compliance verification
						• IRS Nonprofit Business Master file
						
						AngelPoints
						• Windows XP, Vista and 7
						• IE 6, 7, 8, 9
						• Firefox
						• Volunteer Canada
						• Idealist.org
						• CECP
						• File viewers
								SharePoint, Microsoft SQL server database
								– Web browser interface supporting Internet Explorer, Chrome, Safari and Firefox with SSL
								
								FIMS - Progress
								
								Foundation Power – PowerBuilder/ Sybase
								
								AngelPoints – Java/HTML/Tomcat,/MySQL on Linux Actuate reporting

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					hours • CRA View-Only role • Easier management of recurring events • Report on CRA-eligible event participations • Pre-event survey for waitlist participants • Reporting Dashboard automatically available to users with reporting credentials	• Citrix MetaFrame • AST Trust - Seamless Processing • Web service API for AP • SSO		
NPower *(2009)* 212-564-7010 www.npower.org/foundationconnect *Brad Helies Senior Manager, Account & Partner Engagement brad.helies@npower.org NPower NY 3 MetroTech Center, Brooklyn, NY 11201*	54 U.S. clients	12 FTE staff	Private foundations Community foundations Corporate foundations Nonprofits awarding scholarships or fellowships	NPower's FoundationConnect is a total solution for managing the grantmaking lifecycle. FoundationConnect is a fully cloud-hosted solution that provides a stable, secure and scalable platform that can grow and adapt to a foundation's evolving needs.	• Foundation Center eGrant reporting • OFAC Verification • External Reviewer Portal • Improved Payment Wizard • Spell check & character count added to the applicant portal • Native Support for individual applications (scholarships & fellowship) • Applicant Portal Usability Enhancements • Security and Performance Review by Deloitte resulting best practice configurations of our Elastic Load Balancer & Synthetic Transaction Monitors • Incorporation of Pub78 into our automated 501(c)(3) verification	• Microsoft Outlook • Microsoft Office • Gmail • Google Docs • iOS, Android, Blackberry, Windows Mobile • IRS Master Business File, Publication 78 • OFAC • Vertical Response • DocuSign • NetSuite • FinancialForce • SOAP/REST APIs	Hosted All data resides in Force.com platform. Foundation users access through their Salesforce.com login Applicant, Grantee, & External Reviewer interaction via web-portals hosted in Amazon Elastic Computing Cloud	The database layer and grantmaker user interface is built on the Force.com CRM platform. https://www.salesforce.com/platform http://trust.salesforce.com/trust/security/ Applicant/Grantee portal layer is built in Microsoft .NET and hosted in Amazon's Elastic Compute Cloud (Amazon EC2). http://aws.amazon.com/ec2/ 100% Web based including support for Firefox, Internet Explorer, Chrome, & Safari browsers.

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PhilanTech (2004) 888-784-7268 www.philantech.com info@philantech.com 1875 I Street NW, Suite 500 Washington, DC 20006	37 U.S. clients 1 Intl.	4 staff	Private foundations Corporate foundations Community foundations Nonprofit Organizations	• PhilanTrack® Online Grants Management System – Grantee management (contact management, 501(c)(3) verification, activity history); – Online proposal management (eligibility quiz, tailored applicant questionnaires, complete applicant information, uploaded documents); – Thorough online progress reporting (automated grantee email reminders, tailored grantee questionnaires, complete grantee information); – Dynamic report generation (summaries, graphs, charts, viewed online or downloaded/printed for trustees); – Grantee financial analysis (unique grantee financial analysis tool evaluates grantee financial health and performance)	• Released version 2.0 of PhilanTrack (after version 1 release 1.17) • Streamlined and simplified applicant/grantee registration process • Created more flexible reporting, both within the system and exports to CSV, for grant, grantee, and proposal information • Added optional "recommended" stage for grant proposals to better match some grantmakers' processes • Enhanced reviewer functionality for internal and external reviewers. Reviewers can view proposals, begin review, save work in progress, return to review at later date • Enhanced support for international grantmakers • Improved grantmaker ability to manage grantee contacts, and track interactions with grantees	• Generate reports in HTML or CSV, export to Word or PDF • Microsoft Word • Microsoft Excel • Adobe PDF • Email clients (e.g., Outlook) • Available Foundation Center eGrant Reporting • CSV exports can be used to import into other foundation systems • FIMS • Available API	Hosted solution (SaaS) standard for all clients	Web browser interface supporting Internet Explorer, Firefox, Safari, on both PC and Mac Underlying technology platform is built in Python and PostgreSQL
SmartSimple (2003) www.smartsimple.com sales@smartsimple.com 33 W 19th St. New York, NY 10174 (866) 239 0991	40 clients 10 in US 22 In Canada 8 in the EU	20 FTE staff who focus on the developing and implementing GMS360 44 total staff .	Public foundations, Private foundations Corporate foundations Corporate Giving Programs and volunteerism Government Agencies Research funders Universities	GMS360° - Grants • Manages full granting and reporting processes • Multiple role based portals; staff, community partners, reviewers, volunteers, employees • Integrated community building tools; surveys, email broadcast, discussion groups • Optional donation and volunteer management applications • Workflow and report subsystems • On-line budgets	2011 • Online budgets • Fillable PDFs generating applications and reports • Employee Matching Gift/Employee Giving functionality • IRS, OFAC, CRA and HM Revenue and Customs (UK) integration • Customizable Language support. • Integrated research publication databases. • Multi-currency management • Foundation Center eGrant Reporting	• Microsoft Office Word, Excel and Outlook plug-ins • Accounting - QuickBooks, Accpac, SAP multiple versions • CRM – SugarCRM, Siebel, NetForum • Apache Axis based Web Services • Built-in jQuery support • IBM FileNet • Foundation	SaaS Dedicated SaaS (dedicated servers) Enterprise License (in-house Install)	Clients • Android Mobile Applications in beta • Internet Explorer (7 and up) • Firefox • Chrome • Safari – Functional but not officially supported • IPAD and other tablets

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(February 1st 2013) *111 Peter St. Suite 405* *Toronto, Ontario Canada, M5V 2H1* *(416) 591-1668* *40 Kingram Place* *Dublin 2, Ireland* *353 (0) 1 662 9236*				RMS360° - Research Grants • Manages full research granting and reporting processes • Multiple role based portals; researcher, research office, reviewer, staff • Review Panel management • Integrated research publication databases. • Integrated CV management • Track commercialization outcomes, IP, patents. • Online research project budgets Each implementation is configured from an extensive feature set that can be mixed and matched to meet client requirements	2012 • Auto feeds from HR, Finance and other CRM system • Real-time data exchange • Automated data migration from other GMS vendors • Multiple location hosting, US, Canada, Europe and Africa • GuideStar Integration • Point and Click personalized and exportable list views • Enhanced Outlook support – emails linked directly to grant and contacts from Outlook	Center eGrant Reporting		– Functional but not officially supported. Platform • Apache Web Server • Tomcat – Application Server • MySQL – Database Server version 5.1 • Linux (CentOS) – Operating System

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			Private foundations
			
			Family foundations
			
			Faith-based foundations
			
			Corporate foundations
			
			Community foundations
			
			Donor advised funds
				• ZoomGrants Pro
				  – grants (to organizations or individuals)
				  – scholarships
				  – fellowships
				• ZoomGrants (standard)
				  – grants to organizations only
					• Foreign language support for international users (in over 110) countries
					• Enhanced budget form design
					• Invoice and Payment tracking including document attachments
					• Follow-up questions on individual applications
					• Enhanced Post-funding Reports
					• Individually customizable post-funding reporting deadlines
					• Enhanced Email Message Templates
					• Enhanced customizable reports – saved reports as well as on-the-fly reports
					• Enhanced internal due diligence and tracking features
					• Optional blind reviews
					• Enhanced document support for different application stages – PreApplication eligibility,
						• Export CSV) to a wide variety of common software applications including Microsoft Word, Excel, Access, SQL – as well as their free counterparts from OpenOffice.org.
						• Export to other grant management databases.
						• Export to financial accounting applications.
							ZoomGrants is a SaaS service with nothing to install other than one line of HTML on your website.
							
							Includes 24x7 hosting, security, and data backups.
							
							Includes unlimited technical support via phone and email.
							
							Includes instant feature upgrades.
								Users interface with ZoomGrants through any modern web browser, including Internet Explorer, Mozilla Firefox, Opera, Chrome, Safari.
								
								ZoomGrants works well on any Macintosh, Windows or Linux system.

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			Local clubs and giving circles College scholarships		Full Application, Post-funding, and Invoicing			

Information sources: Information shown in the table above was provided to IAA in January 2013 by each grants management system vendor / service provider describing their clients, staff, products, and services as of 1/1/2013. We greatly appreciate their sharing of this information so that grantmakers can learn about services and make well informed decisions.

Some additional providers: Some additional U.S. and Canadian commercial grants management and online application vendors and service providers:

CAMT – www.egrant.org
DonationExchange – www.donationexchange.com
Mosaic Network – www.mosaic-network.com
Versaic - www.versaic.com

* ChesterCAP – www.chestercap.com
FluidReview – www.fluidreview.com
PowerOFFICE – www.poweroffice.info
WESTAF – www.westaf.org

CommunityForce- www.communityforce.com
* JK Group – www.easymatch.com
* Stellar Technology Solutions – www.stellartechsol.com
* WizeHive – www.wizehive.com

* Vendor with significant market share invited to share their information but declined to report   Ver.21 - Last updated December 10, 2013