EXECUTIVE SUMMARY

Community foundations have a complex set of requirements to track their data. In addition to making grants, a typical community foundation also solicits donations, manages investments and acts as fiscal custodian for funds under advisement from donors, and awards scholarships. In a real way, each community foundation is a grantmaker, fundraiser and financial institution all at once.

There's a limited list of vendors who provide solutions for these particular needs—only five met our requirements for this report to qualify as solutions appropriate for community foundations. By necessity, these vendors provide more than just standalone grants management systems. Rather, they provide integrated ecosystems intended to support all aspects of community foundations' work. Most of the systems we reviewed met this complex set of needs by integrating an ensemble cast of software—sometimes from different vendors—into a comprehensive solution.

Five vendors provide integrated ecosystems intended to support all aspects of community foundations' work.

We evaluated each system by 137 criteria geared to determine how well it stacked up to the criteria most important to community foundations. The report provides more detailed summaries, a comparison chart and extensive reviews of the five systems for each of the 137 criteria. In general, how do the available packages compare?

Bromelkamp Community Pearl

Bromelkamp provides a fully integrated, installed solution built in Microsoft Access. The grants management side of the system uses the same functionality as Bromelkamp's First Pearl, with the same strengths in internal tracking, online grant applications and reviews, and payments and budgeting. The system has strong functionality for printed communications, but is weak in broadcast email. Community Pearl adds full community foundation-specific functionality in a highly integrated system with no need to navigate between multiple modules. It provides reasonable functionality to track incoming gifts, a donor portal, a full accounting system and surprisingly powerful functionality to manage fund details and investment income. The entire system is built in Microsoft Access, which is both a strength and a weakness. On one hand, Pearl leverages Access's solid report builder and uses its inherent flexibility to tailor Community Pearl to each client's needs, including adding fields or features to support unique processes. On the other, Access has limitations in user interface design options, which manifests in sometimes crowded screens, abbreviated labels and heavy reliance on codes that can be daunting for the uninitiated.

ChesterCAP Dotche

ChesterCAP's Dotche provides a central hub to knit a suite of third party components into a hosted software solution for community foundations. Dotche itself specializes in online transactions—it provides strong support for online applications (including a streamlined scholarship application module), application review and a donor portal. Donation tracking functionality is quite weak, however—for instance, it's not possible to track a pledge in the system—as is both printed and emailed correspondence. The system is built to integrate with other solutions to manage relationships, payments and accounting. The vendor demonstrated the system integrated with SunGard's Addvantage to provide reasonably solid support for accounting, fund management and budgeting, and with NetSuite to provide much of the solution's support for relationship management, while also augmenting Dotche's reporting facility. Addvantage and NetSuite

are each robust solutions in their own right that provide substantial value to ChesterCAP's implementation, and while there is fairly seamless cross-product data exchange behind the scenes, the user experience suffers.

Fusion Labs GrantedGE

GrantedGE is an installed system that adds solid grants management functionality to a suite of Blackbaud tools: Raiser's Edge, Financial Edge and Blackbaud Net Community (BBNC). Raiser's Edge is a widely used and well-respected donor management system with powerful features to track gifts, relationships and fundraising processes. Financial Edge is also a well-respected accounting system in its own right. GrantedGE adds mid-level features for tracking grants and scholarships and application review, as well as tailored Net Community functionality with reasonable support for online applications and a donor portal. With support from the powerful Raiser's Edge features, the system provides strong features to create mailings, broadcast emails and reports. The systems are tightly integrated; data flows between the four systems, and the interface matches across the different functions, decreasing the potential confusion of a multi-system setup.

MicroEdge FIMS

FIMS is a traditional, installed community foundation solution that allows clients to assemble a tightly integrated system through an extensive menu of modules. It's a generally solid grants management system with good support for online applications, tracking grants, payments, and both email and printed correspondence. Application review functionality is the exception, however—it has no ability to score applications or to allow external reviewers. Relationship management, donation tracking and broadcast emails are somewhat limited in the core system, but are augmented by the Salesforce-based FIMS CRM system. This CRM system is accessed online via a completely different interface than the core FIMS system.

Stellar Technology Solutions iPhi Suite

iPhi Suite by Stellar Technology Solutions is a quite-powerful online, hosted system for community foundations. The company made its start with software for financial institutions, and this focus shows through robust functionality to manage funds, investment income, donor portals and payments. It's also strong in grants management features, such as online applications, due-diligence functionality and scholarships. While it's very good at what it supports, and was the most consistently usable and integrated system we reviewed, it has some holes. It lacks the ability for reviewers to score applications, for instance, and has almost no functionality to send emails or create printed correspondence. Reporting is also somewhat limited—it's not possible to name and save custom reports, for example—and there's no programmatic access to the data (as through an API). Though composed of several modules, the interface is polished, consistent and pleasant to use throughout, with functionality and data available seamlessly and easily. Functionality is well-thought out and generally powerful.

Do you need robust fundraising functionality or strong integrated broadcast email? Can you afford the systems at the high end? And how important is the user experience?

Which should you use? With just five vendors to choose from, it's tempting to want to explore them all for your organization, but their complexity could make that an overwhelming task. While you'll certainly want to carefully compare two or three, you can likely use this report to eliminate at least one or two of the systems. Consider a few questions to help you decide. These systems aren't cheap—can you afford those at the high end? Do you need sophisticated fundraising functionality, or strong integrated broadcast email? And how important is it to provide your users with a polished and integrated user experience?

COMPARISON CHART

	Bro-melkamp Community Pearl	Chester-CAP Dotche	Fusion Labs GrantedGE	MicroEdge FIMS	Stellar Technology Solutions iPhi
Small foundation, basic functionality [1]					
First year cost	$43K	$80K	$36K[2]	$48K	$10K-$15K [3]
Ongoing yearly cost	$1.2K	$55K	$8.6K[2]	$18K	$4K-$5K [3]
Larger grantmaker, all functionality [1]					
First year cost	$79K	$105K	$153K[2]	$118K	$80-$180K [3]
Ongoing yearly cost	$2.1K	$80K	$18K[2]	$49K	$40K-$100K [3]
Fund Management	●	◐	◐	●	●
Donor Portal	◐	●	●	◐	●
Online Applications	●	●	◐	●	●
Internal Tracking	●	○	●	●	●
Application Review	●	●	●	◎	◐
Scholarships	◐	●	◐	◐	●
501(c)(3) and OFAC	●	◎	◐	◐	●
Adding and Tracking Donations	◐	○	●	●	●
Relationship Management	●	●	●	●	◐
Letters and Board Dockets	●	◎	●	●	○
Email	○	○	●	●	○
Payments and Budgeting	●	◐	●	●	●
Querying and Reporting	●	○	●	◐	◐
Ease of Use	○	○	◐	◐	●
Roles and Permissions	◐	○	●	●	●
Data Access	●	●	●	●	◐
Overall Customization	●	●	◐	●	◐
Vendor Background	●	◐	●	●	●

• None ○ Basic ◐ Solid ● Advanced

[1] **Small**: two named users, one concurrent user, $5,000,000 asset base, 10 grants per year though a single program.. Basic functionality to review applications, track payments, pay grants, manage donors, and track G/L entries. **Large**: 20 named users, 10 concurrent users, $100,000,000 asset base, 100 grants per year though three programs. Includes all functionality covered in this report.

[2] This cost includes both the costs for Fusion Labs and required Blackbaud products.

[3] The licensing fee is calculated based on the value of the foundation assets. See the footnote on page 18 for more details.