Technology Affinity Group
Promoting technology in philanthropy

Selecting and Implementing Cloud-based Services with your Integrated Foundation Information System

November 11, 2014

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609-924-6936

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Overview

- Major trends among Web-based integrated foundation information system service providers

- The importance of browser compatibility
- The different cloud-based services
- Lesson learned from API development and implementation

28 North American Integrated Foundation Information System Software and Service Providers

Altum

Bromelkamp Company foundation technology

ChesterCAP LLC
Seamless Solutions in Philanthropy

closerware

Donation Xchange

Common Grant Application
Simplifying the Art & Science of Giving®

CyberGrants

Dulles Technology Partners

FLUXX

Foundant technologies

Foundation Source

FluidReview™

Fusion Labs

GivingData
A Data Platform for Philanthropy
GIFTS enhancement

{g} Good Done Great

Grantium inc
A Division of CSDC Systems Inc.

GrantStream®
Helping Companies Help Communities™

JK Group Inc.

MicroEdge® blackbaud

mosaic™
social innovation through technology, evaluation and research

philanTECH

roundCorner
Formerly nPower

smartsimple

Stellar Technology Solutions, LLC.

Versaic
We Manage Good

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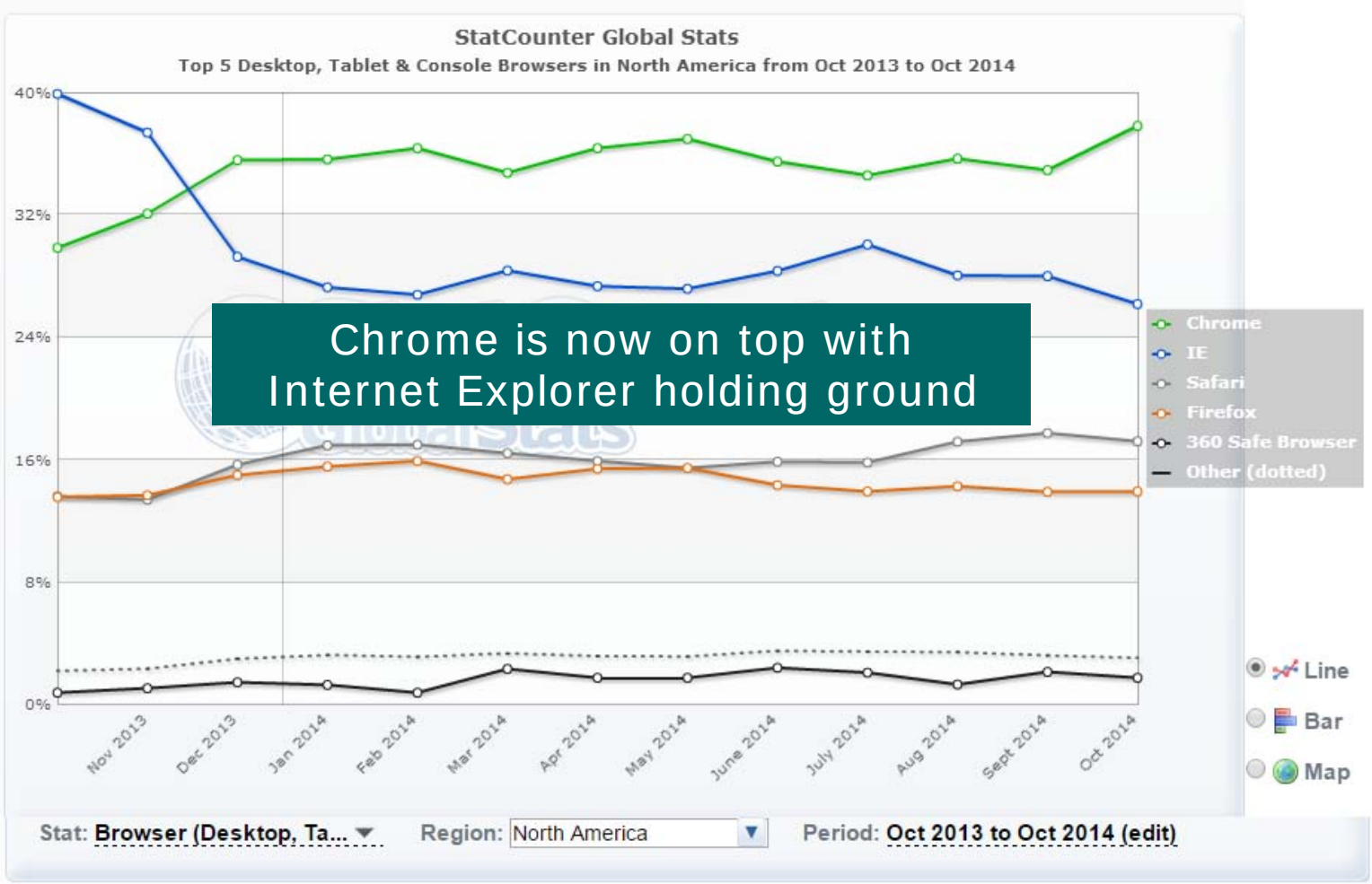
WESTAF

wizehive

ZoomGrants

Fully tested and supported compatibility with all PC and Mac Web browsers worldwide is very Important

Browser Use in **North America**



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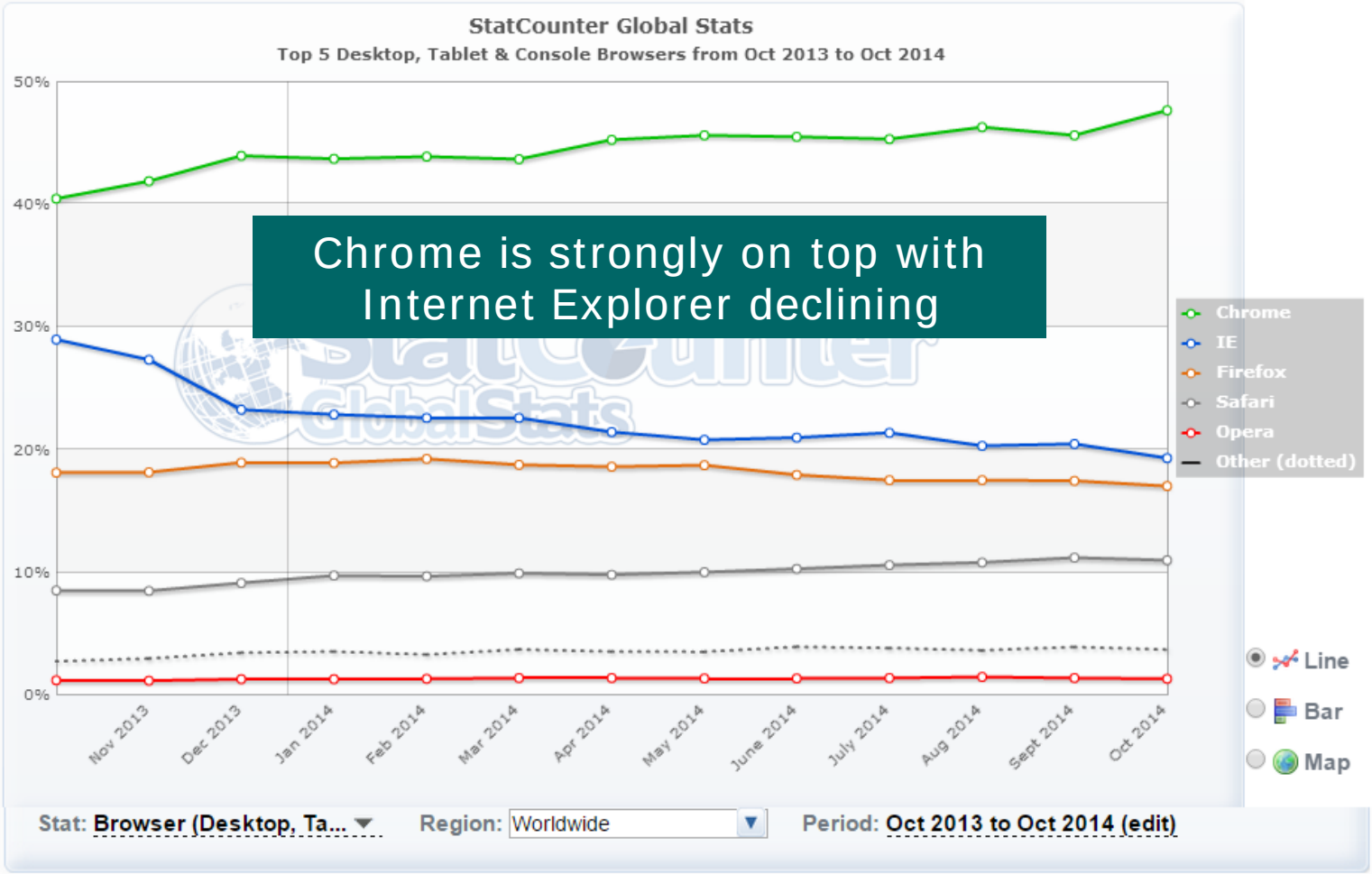
Source: http://gs.statcounter.com/

Browser Use **Worldwide**



Chrome is strongly on top with Internet Explorer declining

Source: http://gs.statcounter.com/

Key topics that we will cover

- **Charity Verifications**
  - 3-step U.S. charity verification checking
  - Alert service advising a U.S. nonprofit has lost their official charity status
  - Non-U.S. charity ED status per U.S. Treasury Dept. standards
  - Office of Foreign Asset Control (OFAC) for anti-terrorist and money laundering checking

More key topics that we will cover

- **Grantee Data Upload and Import**
  - Online nonprofit organization information
  - Electronic grant data reporting
- **Mapping with Dynamic Drill Down**
  - Regional and street maps
  - Maps with grantee and/or geographic area served location + demographic data
  - Custom maps with *your data*
- **Links to AP and Payments**
  - Accounts payable (AP) systems

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Even more key topics that we will cover

- **Electronic Document Signing**
- **Nonprofit Information and Ratings**

- **External E-mail Transmission and Broadcasting**

- **Auto Currency Conversion**
- **Key Factors in API Success**
- **API Challenges and Obstacles**

Some Services Available to Integrate with your Foundation Information Systems

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Charity Verifications

Verifying and Automating U.S. Nonprofit Charity Status

IRS Department of the Treasury
Internal Revenue Service
P.O. Box 2508
Cincinnati OH 45201

In reply refer to: 0248574155
Apr. 20, 2011 LTR 4168C E0
[redacted] 000000 00
00016046
BODC: TE

[redacted]

032072

Employer Identification Number: [redacted]
Person to Contact:
Toll Free Telephone Number:

Dear Taxpayer:

This is in response to your Apr. 11, 2011, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in August 1963.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section 509(a)(2).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website www.irs.gov/eo for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

The Internal Revenue Service reported in 2011 that 275,000 nonprofits lost their tax-exempt status because they did not file legally required documents for three consecutive years.

That move trims the number of tax-exempt groups by about 14 percent.

Source: *http://philanthropy.com/article/275000-Nonprofits-Lose-Tax/127854*

VERY IMPORTANT: Checking ONLY the organization's Letter of Determination is NOT REQUIRED and NOT ACCEPTABLE

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Linking Charity Status Services to Your Grants Management System

Upon completion of the 3-source check, your integrated system should:

1. Set a flag on the nonprofit *organization* record that this has been completed,
2. clearly indicates if the organization did or did not pass this latest check, and
3. saves the results, including the date and time of the check, either in the master database and/or as an auto-saved attachment.

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GuideStar Charity Check Report

- Ability to set up e-mail alerts

- Date and time of search documented
- Clickable icons for saving report to PDF or printing hard copy

- IRS Publication 78 data clearly identified
- At-a-glance verification of charitable status
- IRS deductibility code and limitations, if any
- Date of most recent Publication 78
- Date of most recent Internal Revenue Bulletin

- IRS Business Master File (BMF) data clearly identified
- Charities' 509(a) classification clearly identified
- Organization name from BMF
- Employer Identification Number (EIN) from BMF
- Statement that information is from most currently available BMF, along with BMF revision date

GUIDESTAR

Close

GUIDESTAR

Charity Check Toolbox FAQs

Alerts

Configure Alerts

GuideStar Charity Check® Report Generated on July 08, 2014 at 10:09 AM EDT

National Geographic Society

PDF Print

Also Known As: National Geographic
1145 17th Street Nw
Washington, DC 20036

Charity Check Data Sources
Charity Check FAQs

IRS Publication 78 Details IRS Pub 78 Verified

Organization Name	National Geographic Society
EIN	53-0193519
Location	Washington, DC
Deductibility Status Description	A public charity (50% deductibility limitation).
Most Recent IRS Publication 78	June 2014
Verified with Most Recent Internal Revenue Bulletin	July 7, 2014

IRS Business Master File Details IRS BMF 509(a)(2)

Organization Name	NATIONAL GEOGRAPHIC SOCIETY
EIN	53-0193519
Most Recent IRS BMF	June 9, 2014
IRS Subsection	This organization is a 501(c)(3) Public Charity.
Reason for Non-Private Foundation Status	Section 509(a)(2) organization
Ruling Date	04/1938

On September 8, 2011, the IRS issued regulations which eliminated the advance ruling process for a section 501(c)(3) organization. Learn more.

IRS Revenue Procedure 2011-33 allows grantors to rely on third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) data concerning a potential grantee's public charity classification under section 509 (a) (1), (2) or (3).

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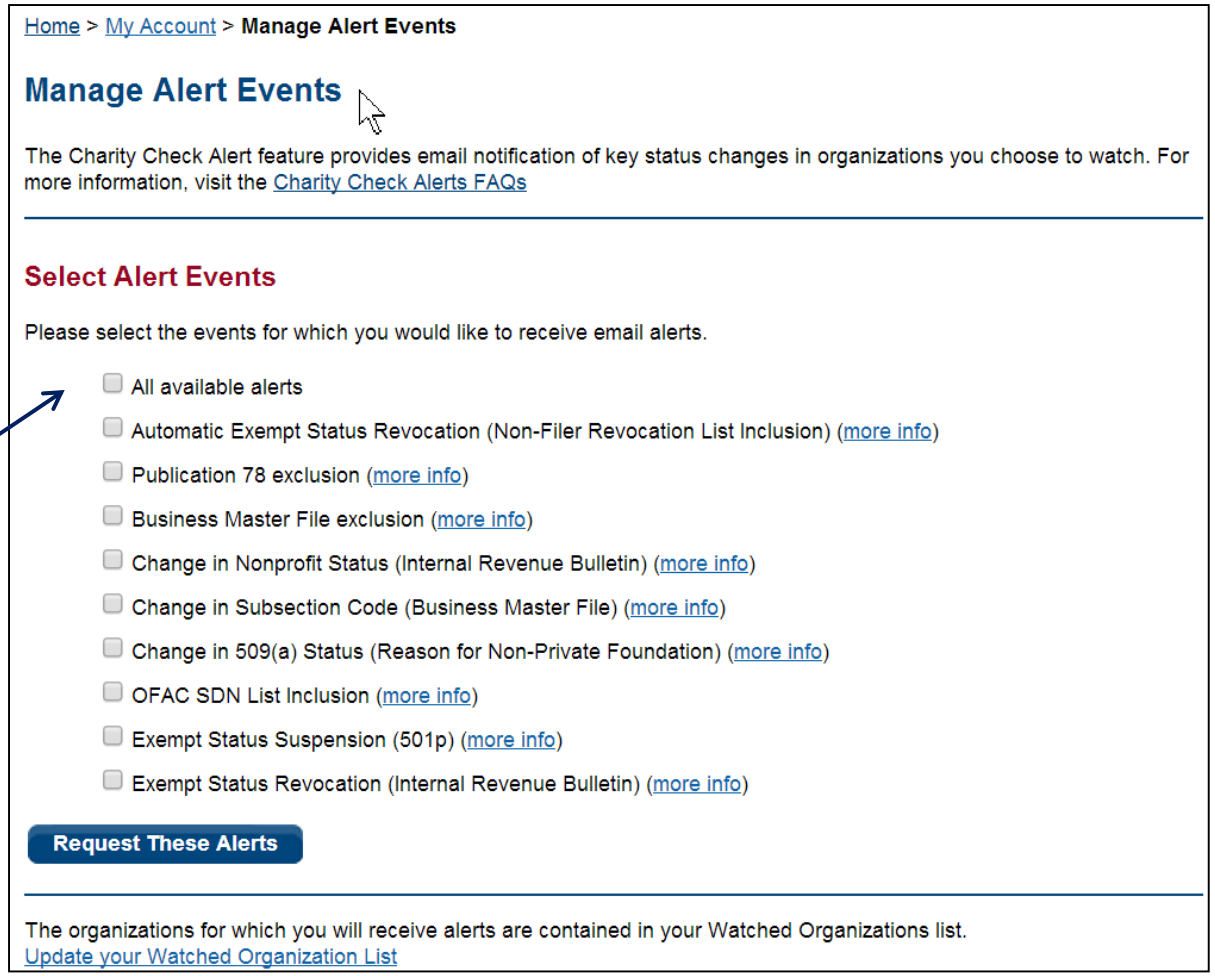
GuideStar's Charity Check Alert Service

GUIDESTAR®

Choose what you need to be alerted about



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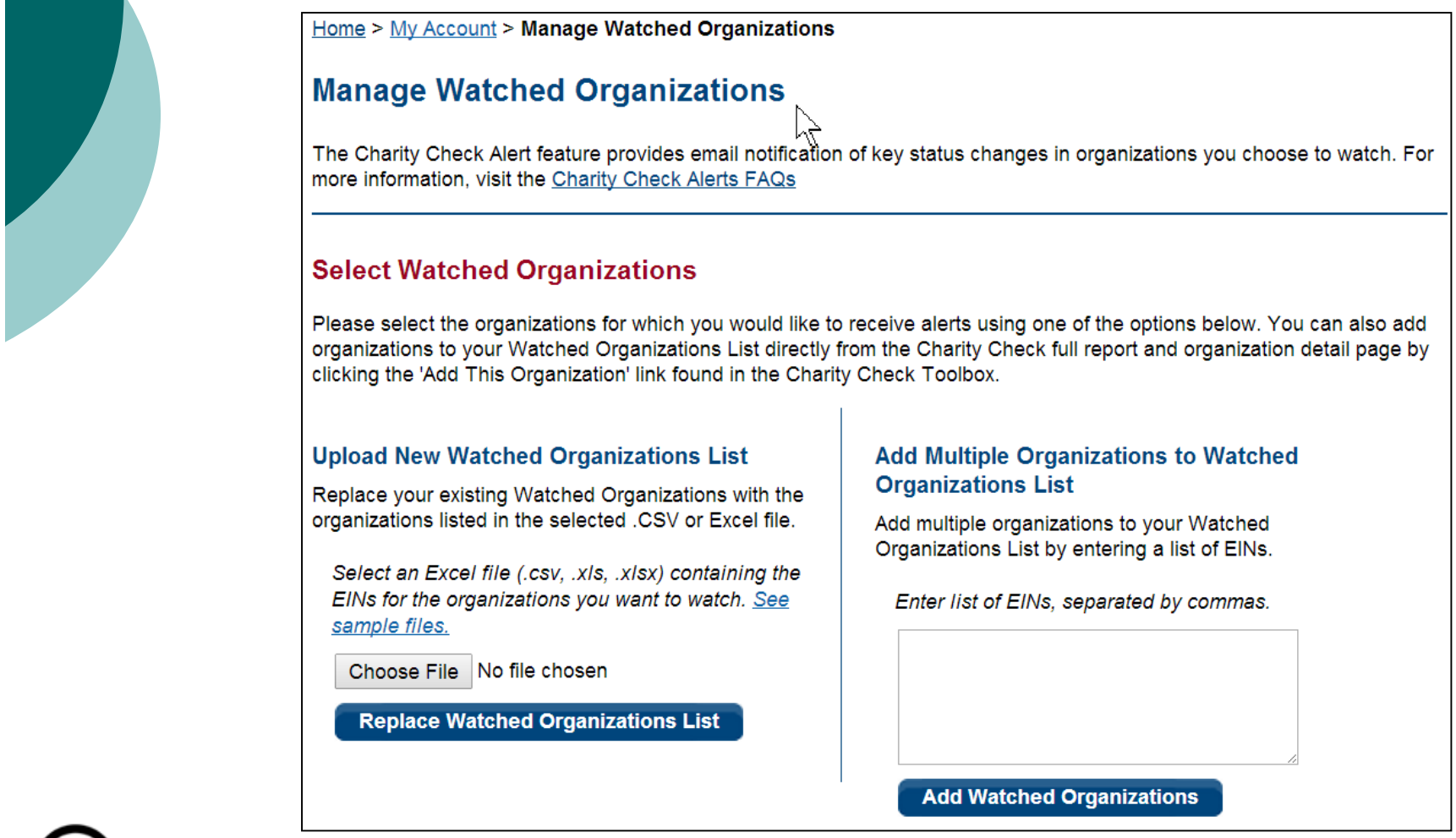
Managing Your Alert Service Watched Organizations



Grantr Good to Grant Organization Report

grantr

Good to Grant™ Organization Report
July 08, 2014 at 07:49 AM UTC

NATIONAL GEOGRAPHIC SOCIETY

1145 17TH ST NW, WASHINGTON, DC 20036-4707

IRS Publication 78 Status

Pub78 ✓

Pub 78 Organization Name
National Geographic Society

EIN
53-0193519

Organization Location
WASHINGTON, DC

Code and Description
None — A public charity with a 50 percent deductibility limitation.

Most Recent IRS Publication 78
June 2014

Verified with Most Recent Internal Revenue Bulletin
March 2014

Latest Changes Made
April 18, 2014

IRS Business Master File Subsection
501(c)(3)

BMF Organization Name
NATIONAL GEOGRAPHIC SOCIETY

Reason for Non-Private Foundation Status
16 - 509(a)(2)

Deductibility
Contributions are deductible

Exempt Organization Status
Unconditional Exemption

Affiliation
Independent

Ruling Date
April 1938

Most Recent IRS BMF
June 2014

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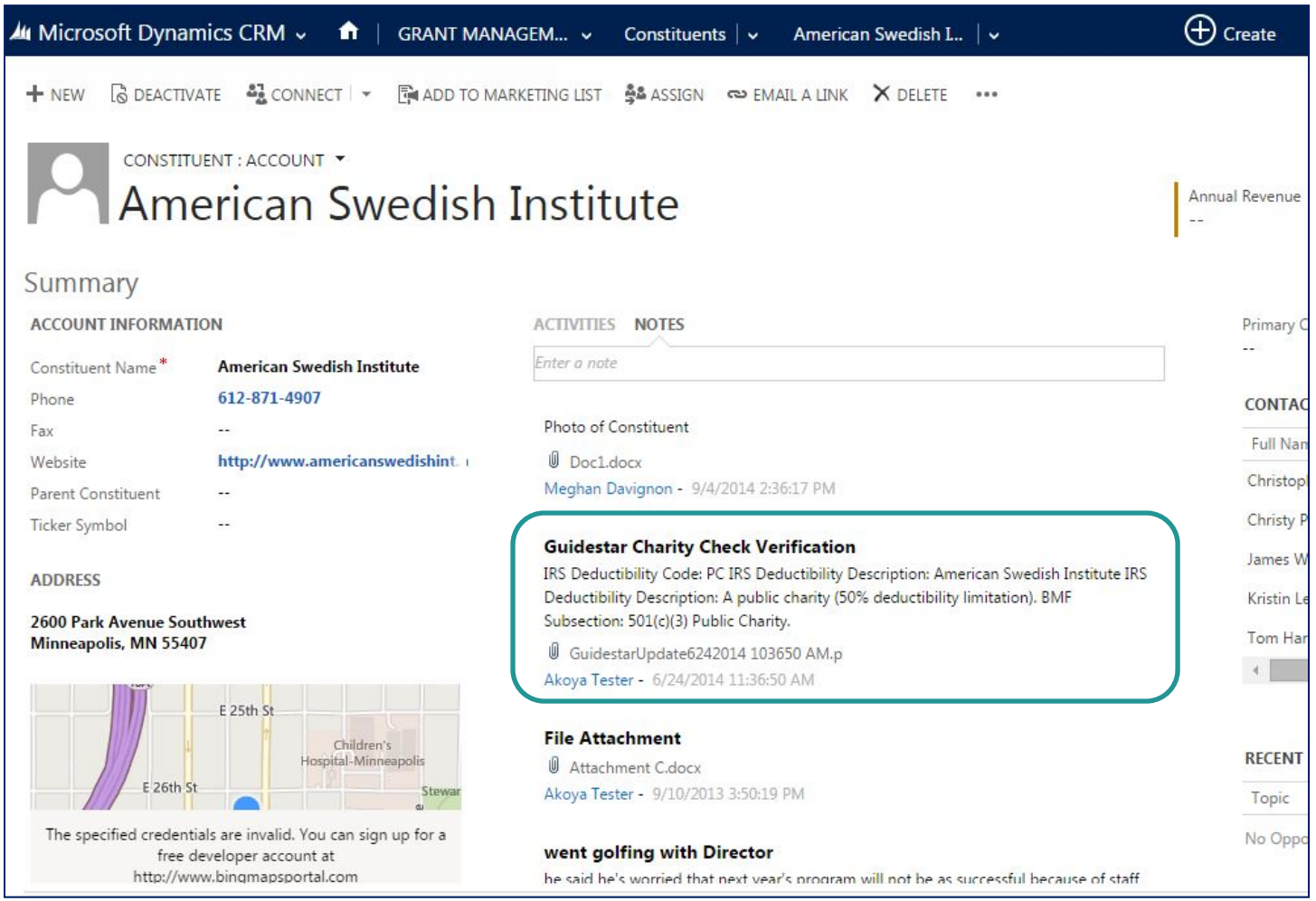
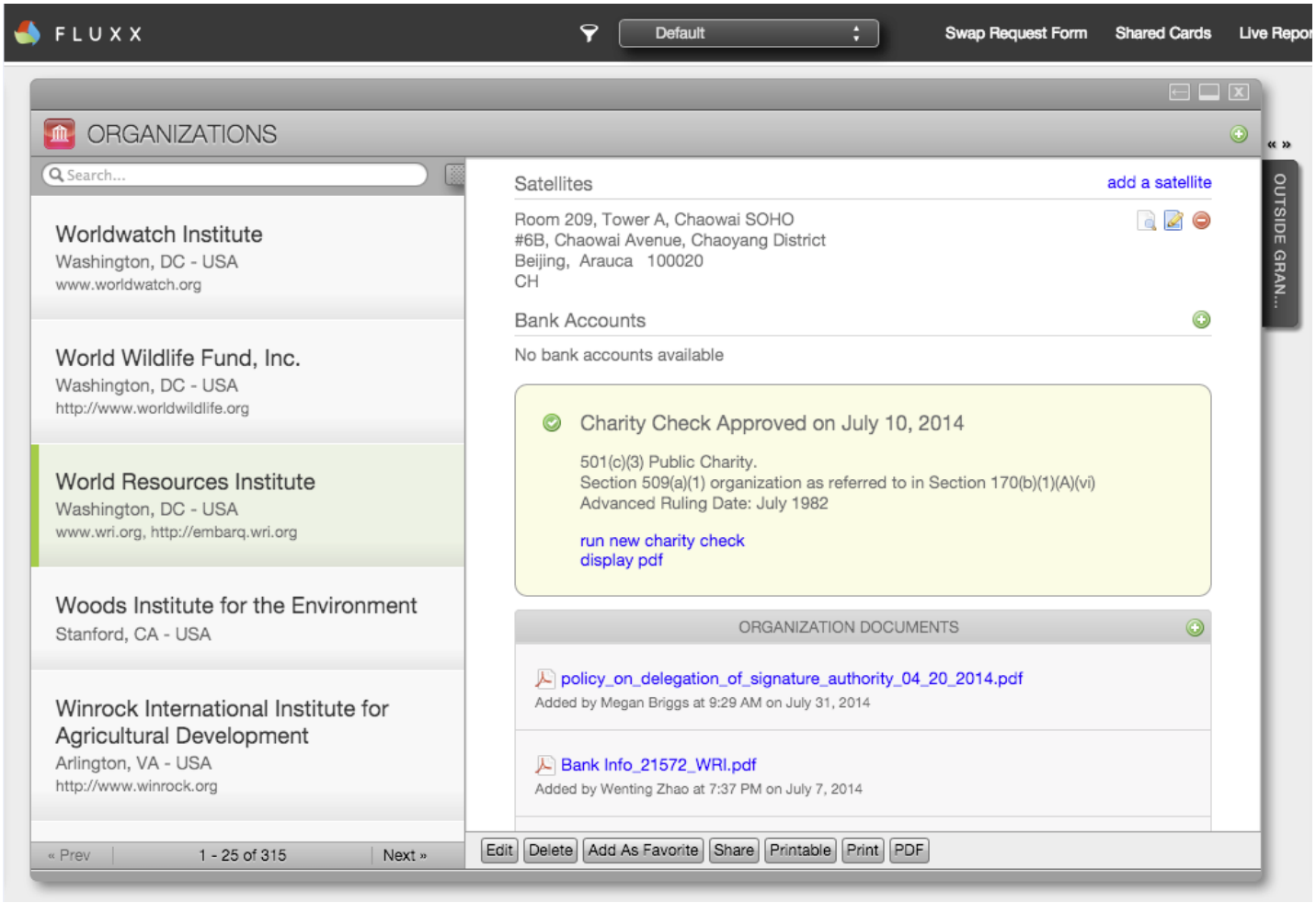
Fully Integrating Charity Check with *Your System*



GuideStar Charity Check Built-in to Your System



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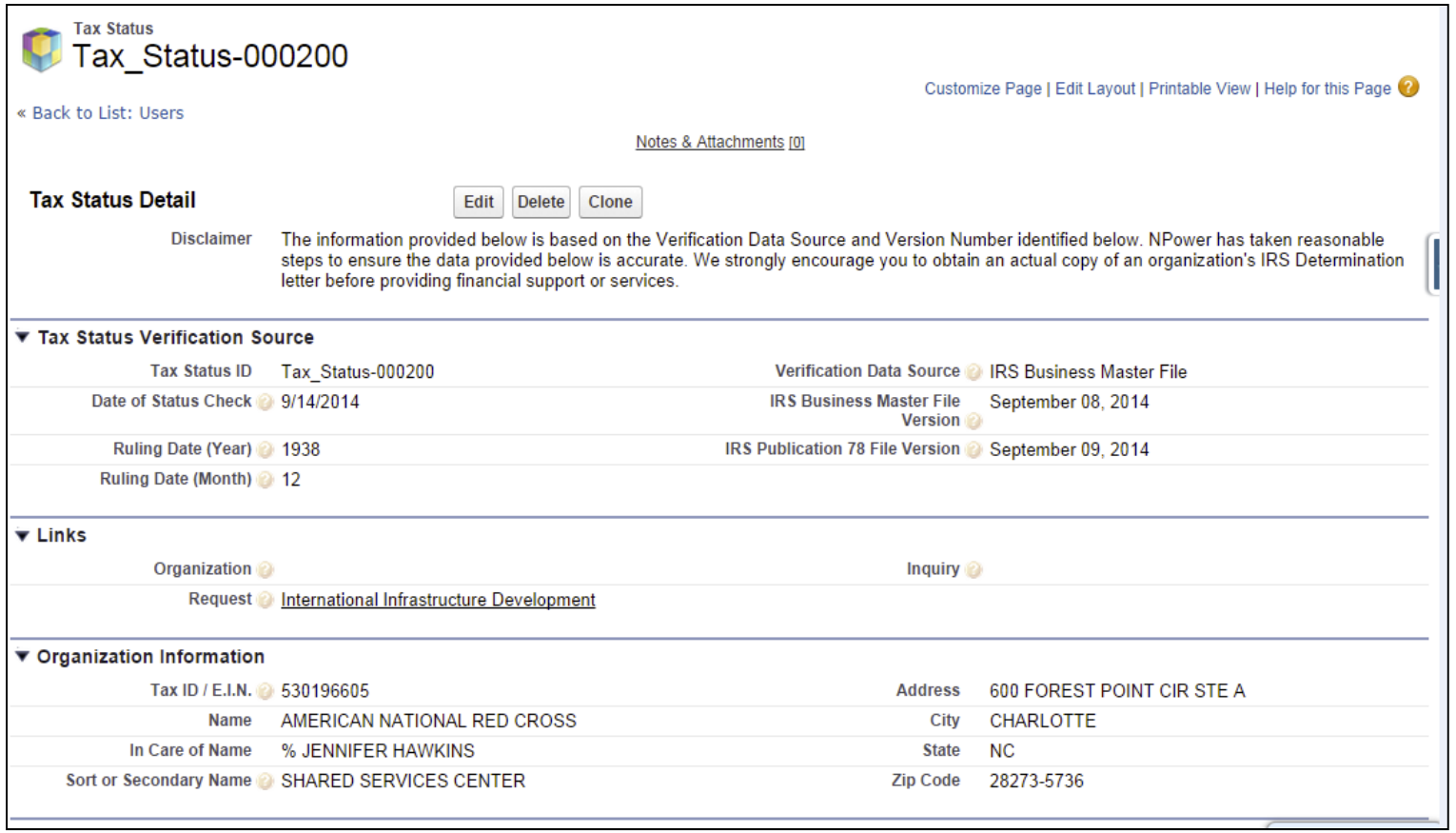
Tax Status Using Only IRS BMF and Pub 78

roundCorner
Formerly nPower



Tax Status
Tax_Status-000200

Customize Page | Edit Layout | Printable View | Help for this Page

« Back to List: Users

Notes & Attachments [0]

Tax Status Detail Edit Delete Clone

Disclaimer: The information provided below is based on the Verification Data Source and Version Number identified below. NPower has taken reasonable steps to ensure the data provided below is accurate. We strongly encourage you to obtain an actual copy of an organization's IRS Determination letter before providing financial support or services.

Tax Status Verification Source

Tax Status ID	Tax_Status-000200	Verification Data Source	IRS Business Master File
Date of Status Check	9/14/2014	IRS Business Master File Version	September 08, 2014
Ruling Date (Year)	1938	IRS Publication 78 File Version	September 09, 2014
Ruling Date (Month)	12		

Links

Organization		Inquiry	
Request	International Infrastructure Development		

Organization Information

Tax ID / E.I.N.	530196605	Address	600 FOREST POINT CIR STE A
Name	AMERICAN NATIONAL RED CROSS	City	CHARLOTTE
In Care of Name	% JENNIFER HAWKINS	State	NC
Sort or Secondary Name	SHARED SERVICES CENTER	Zip Code	28273-5736

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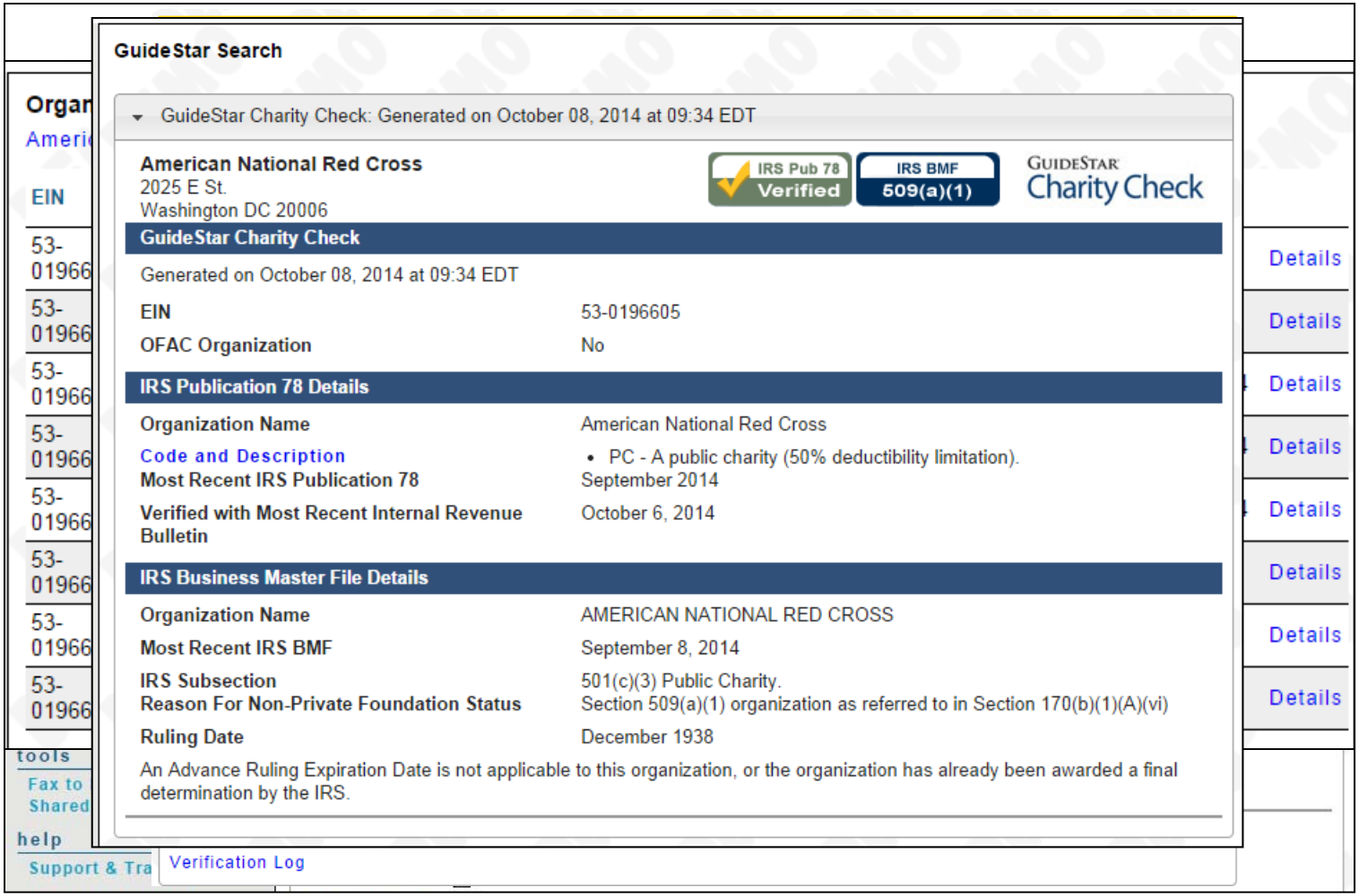
Before and After Running GuideStar Charity Check



Verifying and Automating ***Non-U.S.*** based Charity Status

- Adherence to Treasury Dept. regulations for Equivalency Determination
- Either *you make the grant* to the non-U.S. based NGO using a service,

NGOsource

. . . or *re-grant* with a donor advised fund

CAF AMERICA

SILICON VALLEY community foundation®

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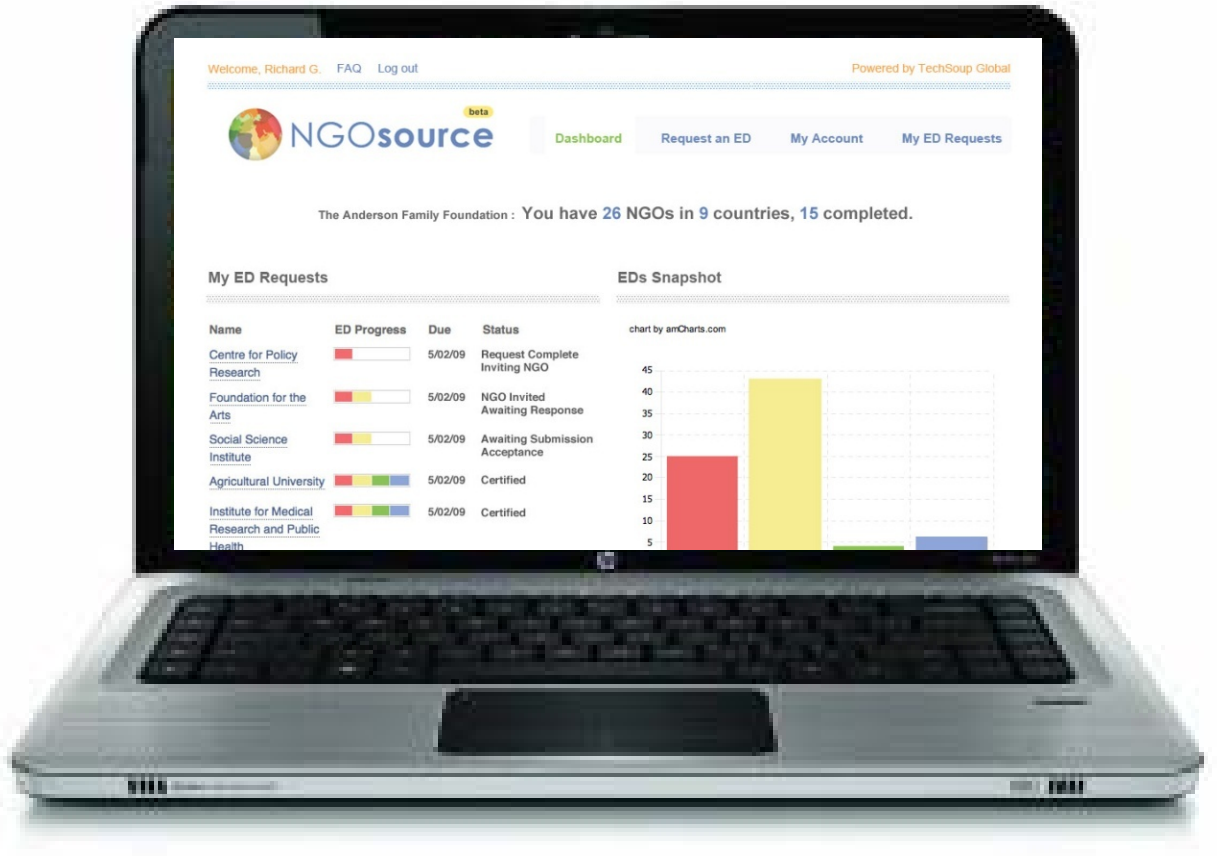
NGOsource Grantmaker Screen



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Spanish Language NGO Screen

Some Grantmakers' Response to the USA PATRIOT Act

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OFAC Compliance Scope*

The prohibition on funding terrorism applies equally to grants made to U.S. and foreign nonprofits

*OFAC and Executive Order 13224 both passed by U.S. Congress to apply to grantmaking organizations just 45 days after the 911 World Trade Center Attack

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U.S. Library of Congress Spellings of the Former Libyan Leader's Name قذافي

(1) Muammar Qaddafi
(2) Mo'ammar Gadhafi
(3) Muammar Kaddafi
(4) Muammar Qadhafi
(5) Moammar El Kadhafi
(6) Muammar Gadafi
(7) Mu'ammar al-Qadafi
(8) Moamer El Kazzafi
(9) Moamar al-Gaddafi
(10) Mu'ammar Al Qathafi
(11) Muammar Al Qathafi
(12) Mo'ammar el-Gadhafi
(13) Moamar El Kadhafi
(14) Muammar al-Qadhafi
(15) Mu'ammar al-Qadhdhafi
(16) Mu'ammar Qadafi
(17) Moamar Gaddafi

(18) Mu'ammar Qadhdhafi
(19) Muammar Khaddafi
(20) Muammar al-Khaddafi
(21) Mu'amar al-Kadafi
(22) Muammar Ghaddafy
(23) Muammar Ghadafi
(24) Muammar Ghaddafi
(25) Muamar Kaddafi
(26) Muammar Quathafi
(27) Muammar Gheddafi
(28) Muamar Al-Kaddafi
(29) Moammar Khadafy
(30) Moammar Qudhafi
(31) Mu'ammar al-Qaddafi
(32) Mulazim Awwal Mu'ammar
(33) Muhammad Abu Minyar al-Qadhafi

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Excerpt of the **900+** Page OFAC List

MALARBE, Oscar (a.k.a. B
Oscar; a.k.a. MAHERBE, C
MAHLERBE, Oscar; a.k.a.
Oscar; a.k.a. MALERVA, C
MALHARBE DE LEON, Osc
MALHERBE DELEON, Osca
Oscar; a.k.a. QALHARBE
(individual)
[SDNTK]

artin; a.k.a. MACHERBE,

a. MALERHBE DE LEON,

Oscar; a.k.a. NALHERBE,
10 Jan 1964; POB Mexico

MALERBE, Oscar (a.k.a. B
Oscar; a.k.a. MAHERBE, C
MAHLERBE, Oscar; a.k.a.
Oscar; a.k.a. MALERVA, C
MALHARBE DE LEON, Osc
MALHERBE DELEON, Osca
Oscar; a.k.a. QALHARBE
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[SDNTK]

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Oscar; a.k.a. NALHERBE,
10 Jan 1964; POB Mexico

MALERHBE DE LEON, Osc
MACHERBE, Oscar; a.k.a.
MALARBE, Oscar; a.k.a. M
MALHARBE DE LEON, Osc
MALHERBE DELEON, Osca
Oscar; a.k.a. QALHARBE
(individual) [SDNTK]

IIRELES, Martin; a.k.a.
.k.a. MAHLERBE, Polo; a.k.a.
.

Oscar; a.k.a. NALHERBE,
10 Jan 1964; POB Mexico

OFFICE OF FOREIGN ASSETS CONTROL

Specially Designated Nationals and Blocked Persons List

July 2, 2014

ALPHABETICAL LISTING OF SPECIALLY DESIGNATED NATIONALS AND BLOCKED PERSONS ("SDN List"):

This publication of Treasury's Office of Foreign Assets Control ("OFAC") is designed as a reference tool providing actual notice of actions by OFAC with respect to Specially Designated Nationals and other persons (which term includes both individuals and entities) whose property is blocked, to assist the public in complying with the various sanctions programs administered by OFAC. The latest changes to the SDN List may appear here prior to their publication in the Federal Register, and it is intended that users rely on changes indicated in this document. Such changes reflect official actions of OFAC, and will be reflected as soon as practicable in the Federal Register under the index heading "Foreign Assets Control." New Federal Register notices with regard to Specially Designated Nationals or blocked persons may be published at any time. Users are advised to check the Federal Register and this electronic publication routinely for additional names or other changes to the SDN List.

2ND ACADEMY OF NATURAL SCIENCES (a.k.a. ACADEMY OF NATURAL SCIENCES; a.k.a. CHAYON KWAHAK-WON; a.k.a. CHE 2 CHAYON KWAHAK-WON; a.k.a. KUKPANG KWAHAK-WON; a.k.a. NATIONAL DEFENSE ACADEMY; a.k.a. SANSRI; a.k.a. SECOND ACADEMY OF NATURAL SCIENCES; a.k.a. SECOND ACADEMY OF NATURAL SCIENCES RESEARCH INSTITUTE), Pyongyang, Korea, North [NPWMD].

7 KARNES, Avenida Ciudad de Cali No. 15A-91, Local A06-07, Bogota, Colombia; Matricula Mercantil No 1978075 (Colombia) [SDNTK].

7TH OF TIR (a.k.a. 7TH OF TIR COMPLEX; a.k.a. 7TH OF TIR INDUSTRIAL COMPLEX; a.k.a. 7TH OF TIR INDUSTRIES; a.k.a. 7TH OF TIR INDUSTRIES OF ISFAHAN/ESFAHAN; a.k.a. MOJTAMAE SANATE HAFTOME TIR; a.k.a. SANAYE HAFTOME TIR; a.k.a. SEVENTH OF TIR), Mobarakeh Road Km 45, Isfahan, Iran; P.O. Box 81465-478, Isfahan, Iran; Additional Sanctions Information - Subject to Secondary Sanctions [NPWMD] [IFSR].

7TH OF TIR INDUSTRIAL COMPLEX (a.k.a. 7TH OF TIR; a.k.a. 7TH OF TIR COMPLEX; a.k.a. 7TH OF TIR INDUSTRIES; a.k.a. 7TH OF TIR INDUSTRIES OF ISFAHAN/ESFAHAN; a.k.a. MOJTAMAE SANATE HAFTOME TIR; a.k.a. SANAYE HAFTOME TIR; a.k.a. SEVENTH OF TIR), Mobarakeh Road Km 45, Isfahan, Iran; P.O. Box 81465-478, Isfahan, Iran; Additional Sanctions Information - Subject to Secondary Sanctions [NPWMD] [IFSR].

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7TH OF TIR INDUSTRIES OF ISFAHAN/ESFAHAN (a.k.a. 7TH OF TIR; a.k.a. 7TH OF TIR COMPLEX; a.k.a. 7TH OF TIR INDUSTRIAL COMPLEX; a.k.a. 7TH OF TIR INDUSTRIES; a.k.a. MOJTAMAE SANATE HAFTOME TIR; a.k.a. SANAYE HAFTOME TIR; a.k.a. SEVENTH OF TIR), Mobarakeh Road Km 45, Isfahan, Iran; P.O. Box 81465-478, Isfahan, Iran; Additional Sanctions Information - Subject to Secondary Sanctions [NPWMD] [IFSR].

8TH IMAM INDUSTRIES GROUP (a.k.a. CRUISE MISSILE INDUSTRY GROUP; a.k.a. CRUISE SYSTEMS INDUSTRY GROUP; a.k.a. NAVAL DEFENCE MISSILE INDUSTRY GROUP; a.k.a. SAMEN AL-A'EMMEH INDUSTRIES GROUP), Tehran, Iran; Additional Sanctions Information - Subject to Secondary Sanctions [NPWMD] [IFSR].

17 NOVEMBER (a.k.a. EPANASTATIKI ORGANOSI 17 NOEMVRI; a.k.a. REVOLUTIONARY ORGANIZATION 17 NOVEMBER) [FTO] [SDGT].

32 COUNTY SOVEREIGNTY COMMITTEE (a.k.a. 32 COUNTY SOVEREIGNTY MOVEMENT; a.k.a. IRISH REPUBLICAN PRISONERS WELFARE ASSOCIATION; a.k.a. REAL IRA; a.k.a. REAL IRISH REPUBLICAN ARMY; a.k.a. REAL OGLAIGH NA HEIREANN; a.k.a. RIRA) [FTO] [SDGT].

32 COUNTY SOVEREIGNTY MOVEMENT (a.k.a. 32 COUNTY SOVEREIGNTY COMMITTEE; a.k.a. IRISH REPUBLICAN PRISONERS WELFARE ASSOCIATION; a.k.a. REAL IRA; a.k.a. REAL IRISH REPUBLICAN ARMY; a.k.a. REAL OGLAIGH NA HEIREANN; a.k.a. RIRA) [FTO] [SDGT].

101 DAYS CAMPAIGN (a.k.a. CHARITY COALITION; a.k.a. COALITION OF GOOD; a.k.a. ETELAF AL-KHAIR; a.k.a. ETILAFU EL-KHAIR; a.k.a. I'TILAF AL-KHAIR; a.k.a. ITTILAF AL-KHAYR; a.k.a. UNION OF GOOD), P.O. Box 136301, Jeddah 21313, Saudi Arabia [SDGT].

2904977 CANADA, INC. (a.k.a. CARIBE SOL; a.k.a. HAVANTUR CANADA INC.), 818 rue Sherbrooke East, Montreal, Quebec H2L 1K3, Canada [CUBA].

A A TRADING FZCO, P.O. Box 37089, Dubai, United Arab Emirates [SDNTK].

A K DIFUSION S.A. PUBLICIDAD Y MERCADEO, Calle 28N No. 6BN-54, Cali, Colombia; NIT # 900015699-8 (Colombia) [SDNT].

A K EDUCAL S.A. EDUCACION CON CALIDAD, Calle 28N No. 6BN-54, Cali, Colombia; NIT # 900015704-7 (Colombia) [SDNT].

A RAHMAN, Mohamad Iqbal (a.k.a. ABDUL RAHMAN, Mohamad Iqbal; a.k.a. ABDURRAHMAN, Abu Jibril; a.k.a. ABDURRAHMAN, Mohamad Iqbal; a.k.a. MUQTI, Fihiruddin; a.k.a. MUQTI, Fikiruddin; a.k.a. RAHMAN, Mohamad Iqbal; a.k.a. "ABU JIBRIL"), Jalan Nakula, Komplek Witana Harja III, Blok C 106-107, Pamulang, Tangerang, Indonesia; DOB 17 Aug 1957; alt. DOB 17 Aug 1958; POB Korleko-Lombok Timur, Indonesia; alt. POB Tirpas-Selong Village, East Lombok,

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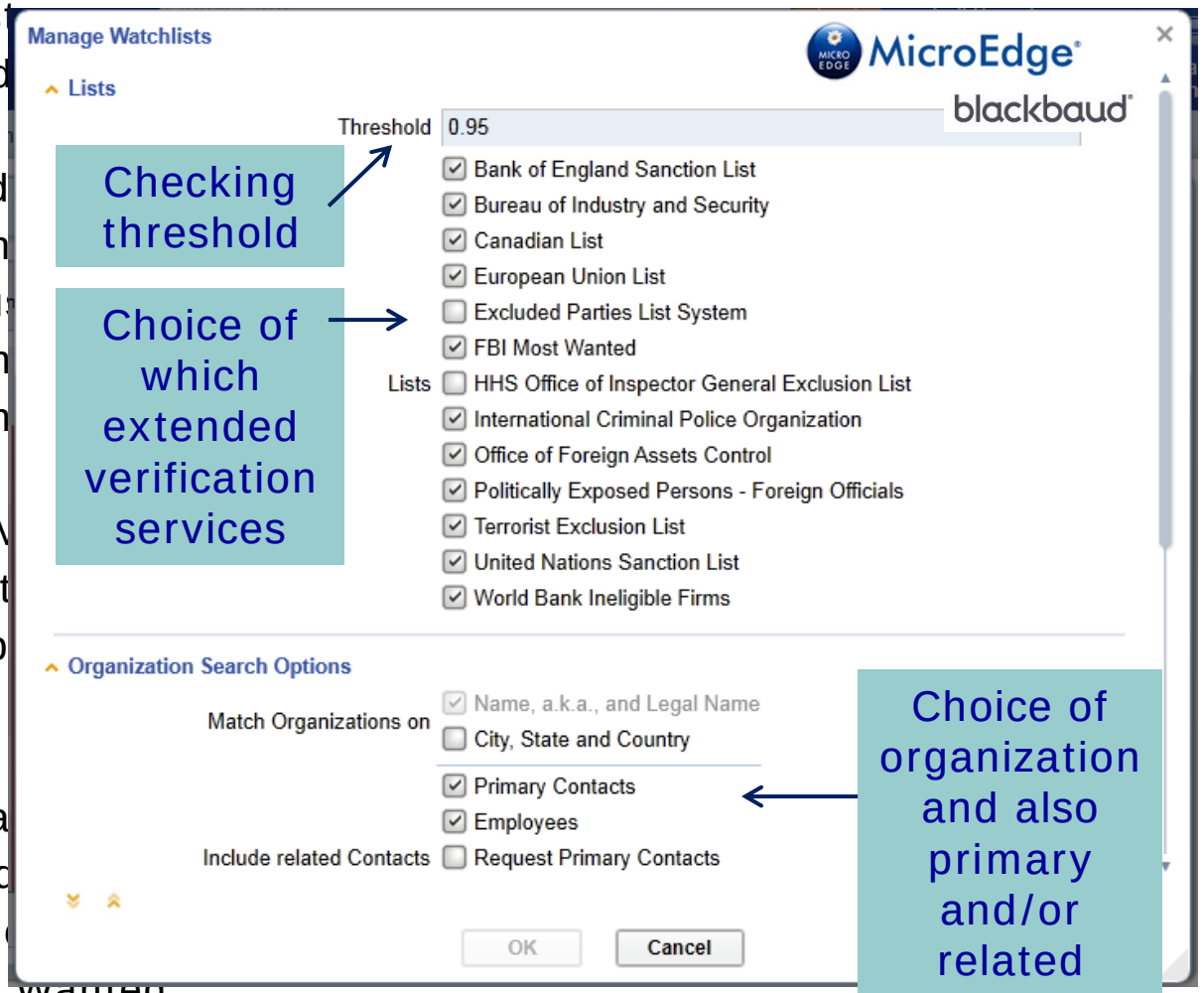
Source: http://www.treasury.gov/ofac/downloads/t11sdn.pdf

Terrorism Watch Lists

- OFAC SDN list
- OFAC Blocked
- Bureau of Ind
- Canadian Con
- FBI Hijack Su
- FBI Most Wan
- FBI Most Wan
- FBI Seeking I
- FBI Top Ten M
- Non-Cooperat
- Politically Exp
- Unauthorized
- Bank of Engla
- DTC Debarred
- European Uni
- Interpol Most Wanted
- United Nations Consolidated List
- World Bank Debarred Parties



OFAC Checking and Linking Systems

- OFAC checking services
  - Batch and real time
  - Extended verification services
  - OFAC list updating
  - OFAC white listing
- Commercial service providers
  - *Fee-based* subscription services
  - *Free services* built-in to the cost of *some* hosted foundation information systems

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OFAC Checking – Key Things to Consider

- Does the service include checking both the organization name and officer names? Many don't. Some grantmakers and their lawyers require both.
- DON'T try to check the names of all board members. NYC's Lincoln Center has ~100 board members who keep changing
- All checked data must be in your system's data fields, NOT just in an attached document or spreadsheet. *This is the API's requirement.*
- Be sure you can set the intensity level of checking and can white list false positives.

Grantee Data Upload and Import

eGrant Reporting Standard *Free*

eGrant receives data in either CSV, XLS, or XLSX, formats – intentionally a manual export as requested by grants managers

eGrant Reporting

eGrant Reporting Standard

The following record format/standard describes various types of information that can be included in an electronic grants list. You only need to include those you have available in your own grants management system. Contact Kati Neiheisel at kmn@foundationcenter.org or call (212) 807-3675 if you have any questions about creating and sending an electronic grants file.

Items 1-14 are more basic grant information. Items 15-25 contain information that will help us describe your grants from the perspective of your own programs. Finally, items 26 and 27 will let us better represent total support awarded by community foundations.

1	Grantee organization name	Organization's name as officially recognized (by the IRS for U.S. organizations)
2	Unique grant number	Unique grant number used by the foundation to identify the grant (to be used for reconciliation purpose only)
3	Grantee unit	Subdivision or department of grantee to which grant is awarded
4	Grantee street address	Primary street address
5	Grantee city	City location of grantee
6	Grantee state	Two letter abbreviation for grantee state or province
7	Grantee zip or foreign mailing code	5- or 9-digit zip code or foreign alpha-numeric mailing code
8	Grantee country	To be used *only* for grantees outside the U.S.
9	Grantee Employer Identification Number (EIN)	9-digit number assigned to each U.S. grantee by the IRS
10	Grant description	Summarizes the specific purpose or objective of the grant.
11	Authorized grant amount	Full amount of authorized grant in U.S. dollars at time of initial authorization
12	Grant authorization year	Foundation/giving program's fiscal year-end date in which grant was authorized

923* grantmakers eGrant report their grant information electronically today . . .

this is now growing quickly with the availability of FREE maps

Source: http://www.foundationcenter.org/grantmakers/er_specs.html

* Data reported by Foundation Center as of September 2014

hGrant Reporting Standard *Free*

FOUNDATION CENTER

hGrant Specifications and Field Descriptions

CLASS NAME Required Elements in Bold	CLASS TYPE	DESCRIPTION	FORMATTING NOTES Code and Presentation Notes as Relevant
hgrant	Div Tag to denote block-level element	Each grant entry in your feed must begin with a entry; not one entry for each feed.	
grantor vcard	Div Tag to denote block-level element	You must have a completed Grantor Profile on record with the Foundation Center if you do not supply complete grantor vcard so we can populate your organization's name and url in to the feed. Each grant entry must have your grantor vcard embedded.	
fn org	Class Title	Full legal name of grantor as registered with IRS or international equivalent.	**Foundation Center**

hGrant is the technical specification for publishing grants information to the Web using a series of nested HTML elements with a class attribute to identify each element as an hGrant property.

19* grantmakers hGrant report their grant information electronically today . . .

this is now growing with the availability of FREE maps

Source: http://foundationcenter.org/grantmakers/hGrant_Spec.pdf

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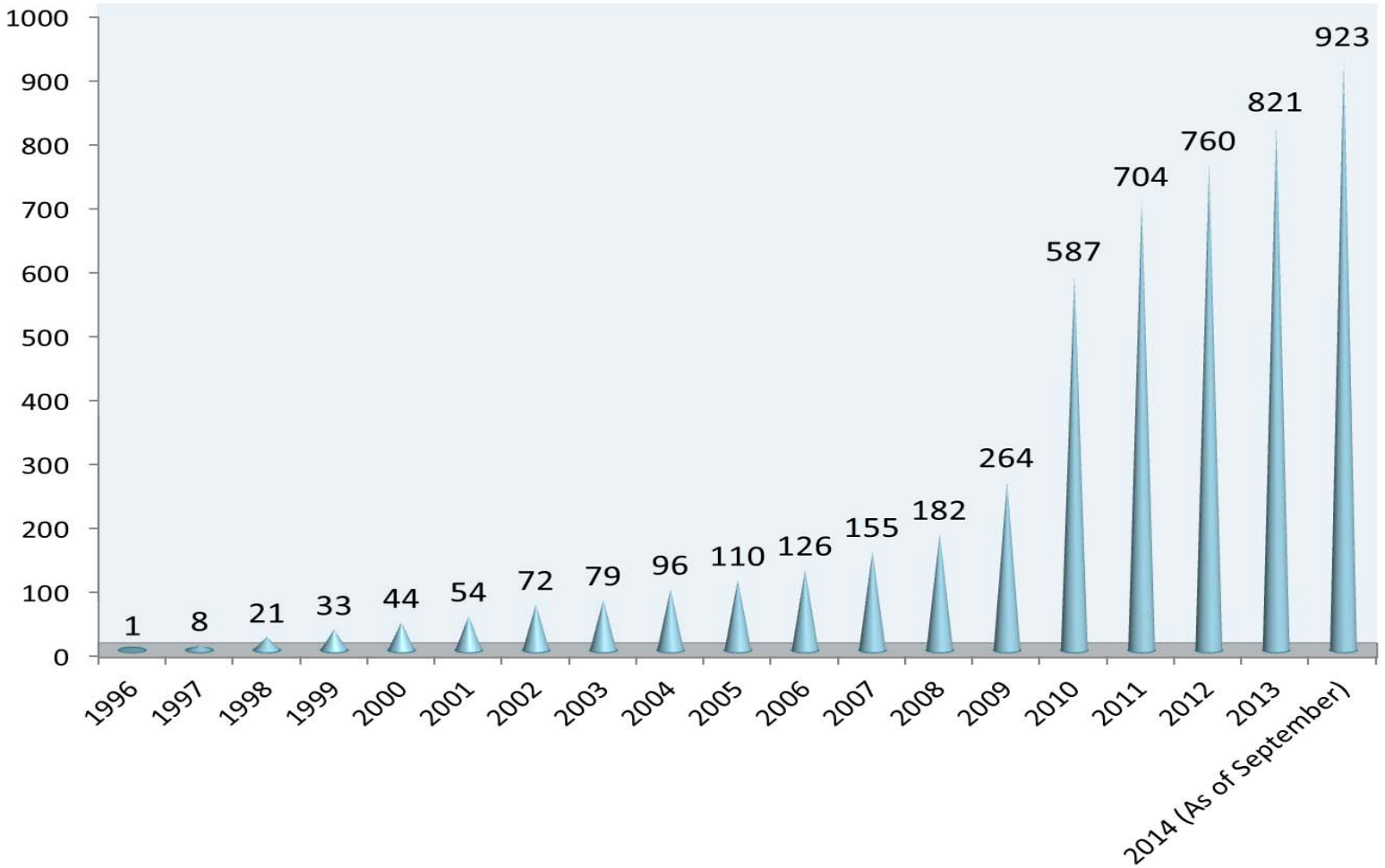
* Data reported by Foundation Center as of September 2014

Growth of eGrant and hGrant Reporters



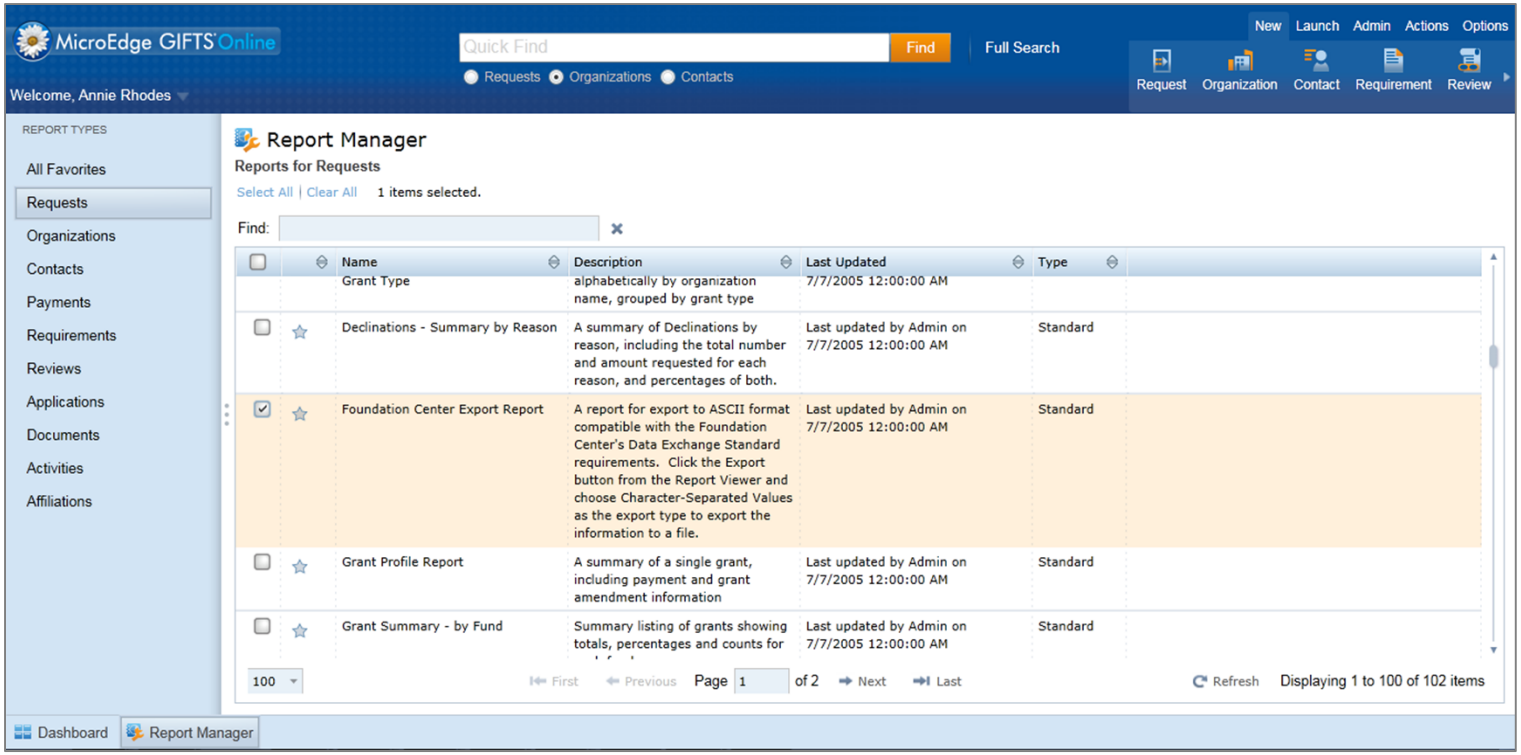
eGrant & hGrant Data Reporting Partners *Free*

Each of these commercial partners provides a free built-in eGrant (all 13) and hGrant (*5) data export in their system

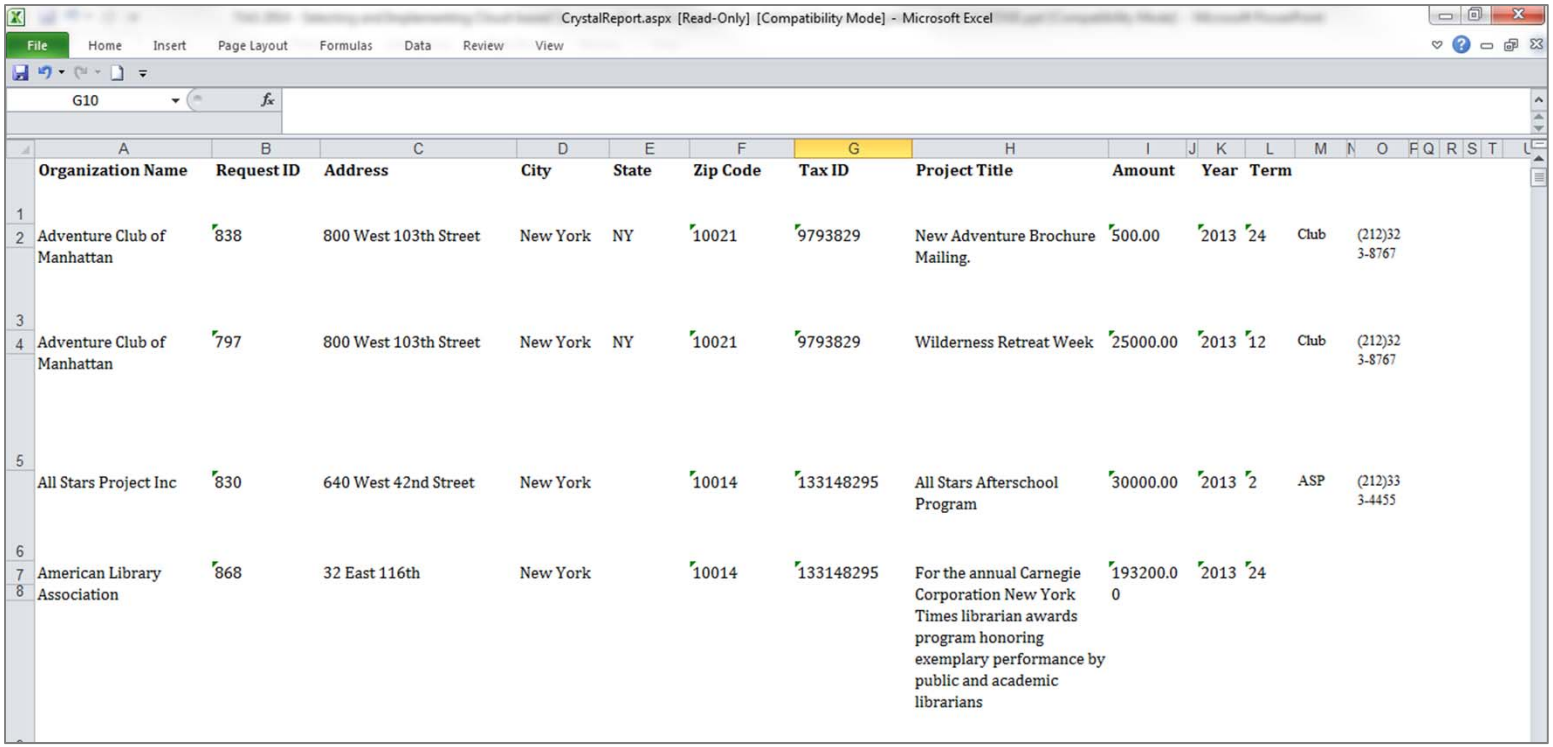
Source: http://www.foundationcenter.org/grantmakers/er_specs.html

*hGrant supporters: Fluxx, MicroEdge GIFTS Online, Good Done Great, roundCorner foundationConnect, and SmartSimple

Using the Built-in eGrant Data Export



An eGrant Data Export File

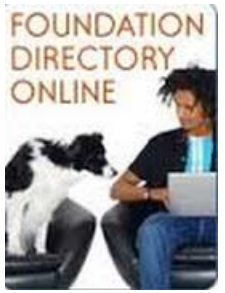


Organization Name	Request ID	Address	City	State	Zip Code	Tax ID	Project Title	Amount	Year	Term		
Adventure Club of Manhattan	838	800 West 103th Street	New York	NY	10021	9793829	New Adventure Brochure Mailing.	500.00	2013	24	Club	(212)323-8767
Adventure Club of Manhattan	797	800 West 103th Street	New York	NY	10021	9793829	Wilderness Retreat Week	25000.00	2013	12	Club	(212)323-8767
All Stars Project Inc	830	640 West 42nd Street	New York		10014	133148295	All Stars Afterschool Program	30000.00	2013	2	ASP	(212)333-4455
American Library Association	868	32 East 116th	New York		10014	133148295	For the annual Carnegie Corporation New York Times librarian awards program honoring exemplary performance by public and academic librarians	193200.00	2013	24		

Mapping with Dynamic Drill Down

Some Current Mapping Options

FOUNDATION CENTER



- Foundation Directory Online (FDO)
  (contains info about 3+ million grants)
- Foundation Maps *(formerly Philanthropy In/Sight)*
  (FREE to eGrant and hGrant reporters)

FOUNDATION CENTER
PHILANTHROPY IN/SIGHT®

- Customized mapping sites
  - Foundation Center
- Google Maps and Street maps
- Service provider mapping with your data
  - SmartSimple and Fluxx

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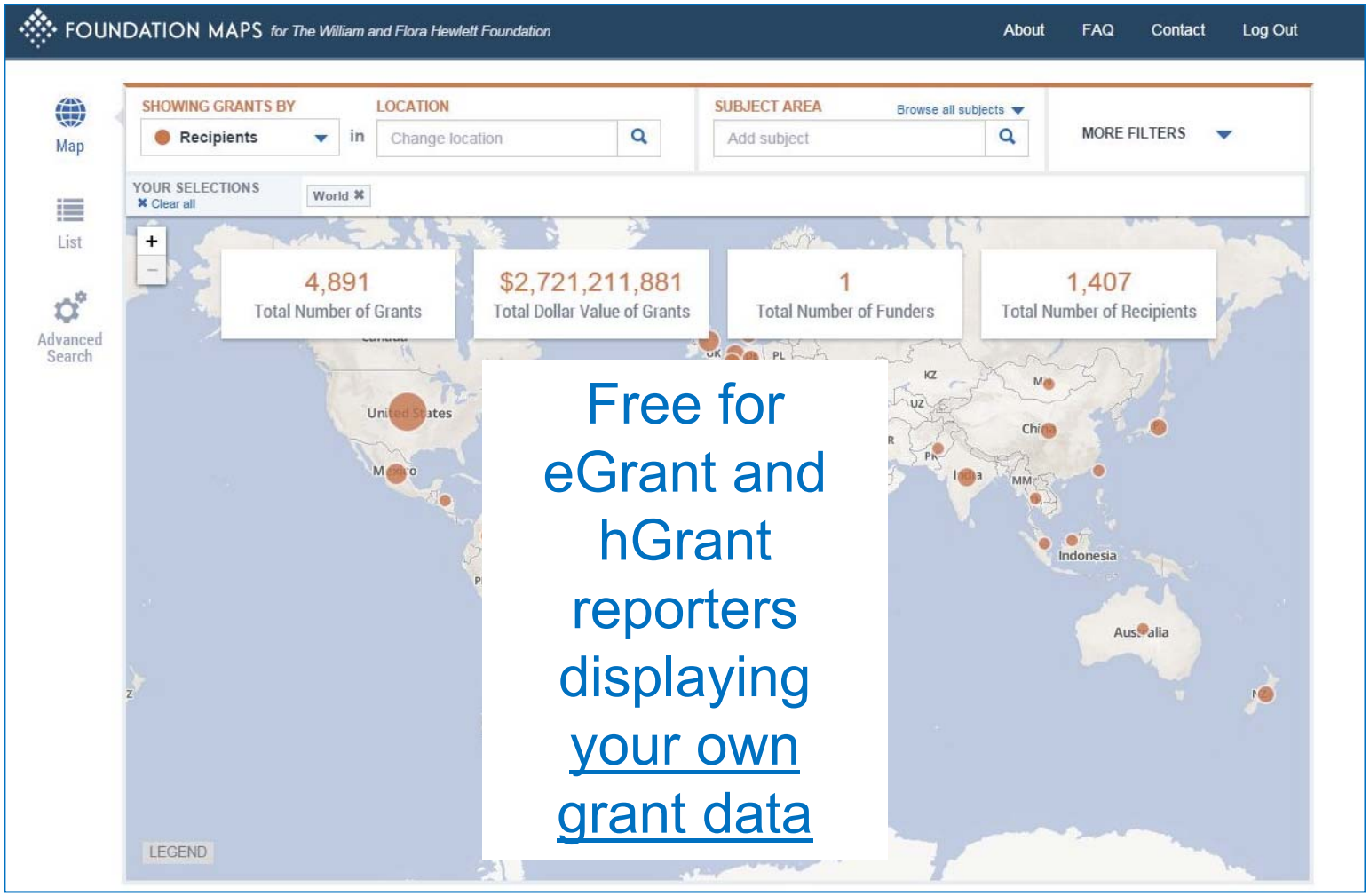
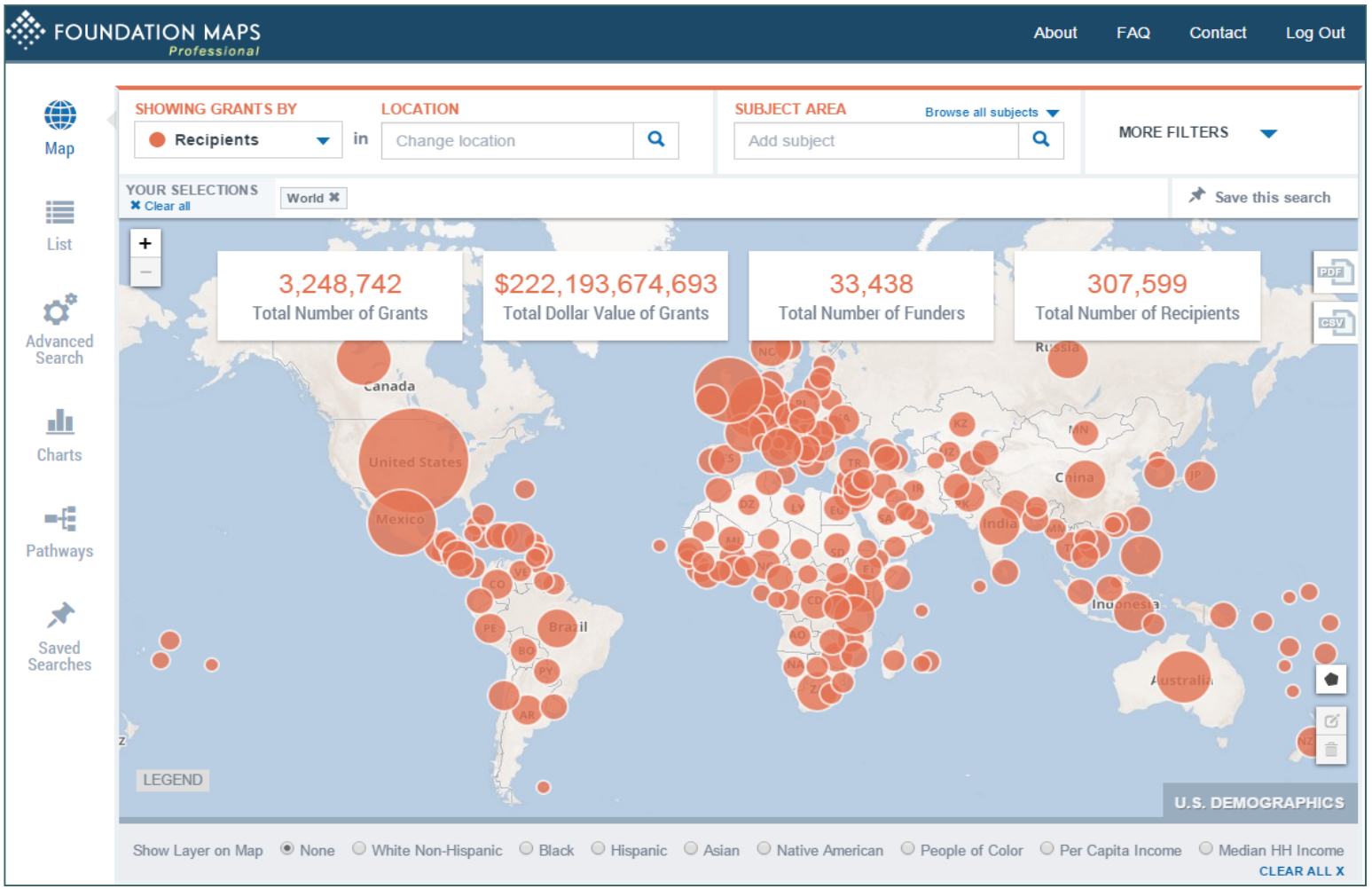
New release in September 2014

Foundation Maps Overview



New release in September 2014

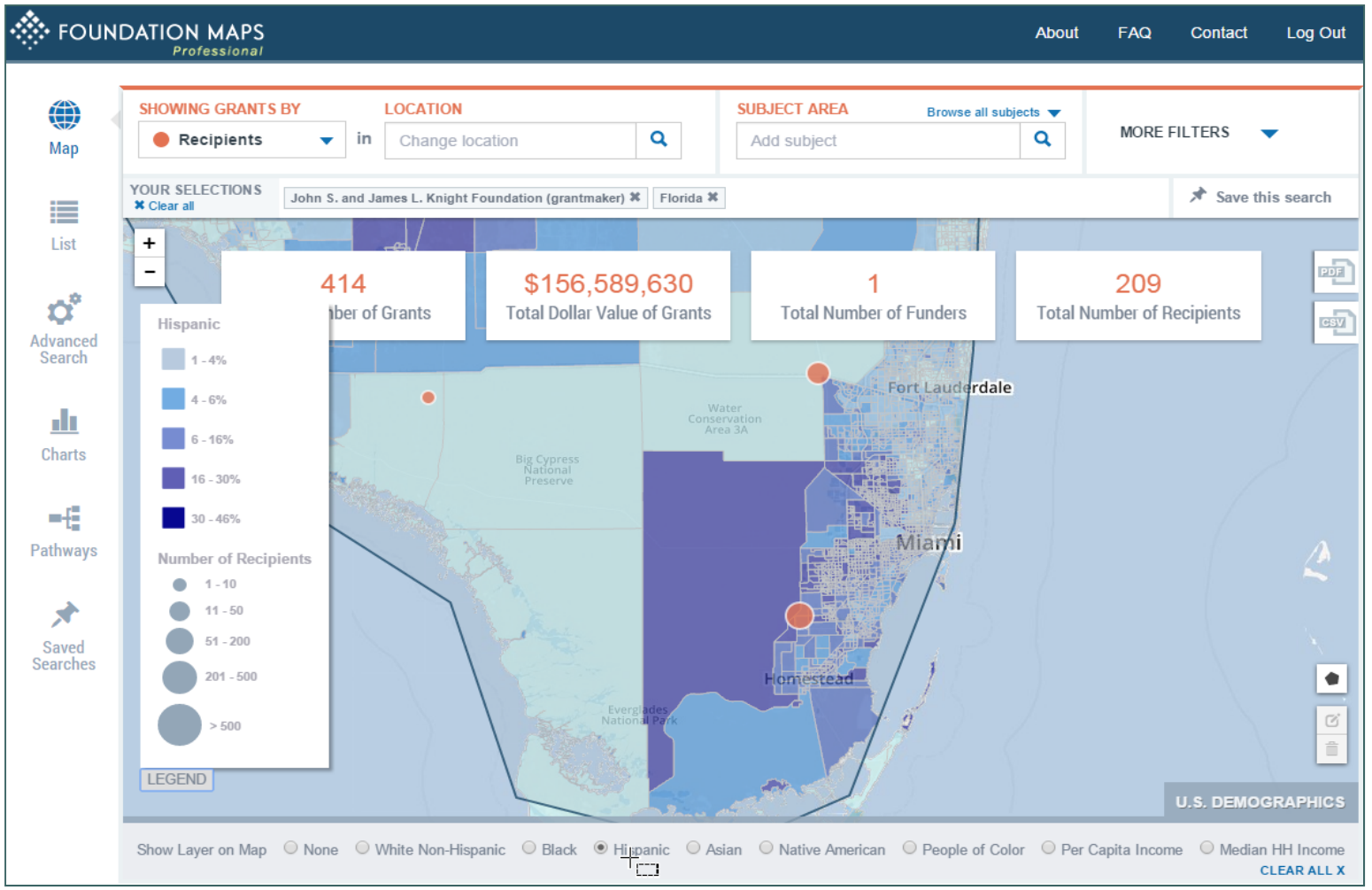
Foundation Maps Search



New release in September 2014

Foundation Maps for One Foundation with Demographics

FOUNDATION CENTER



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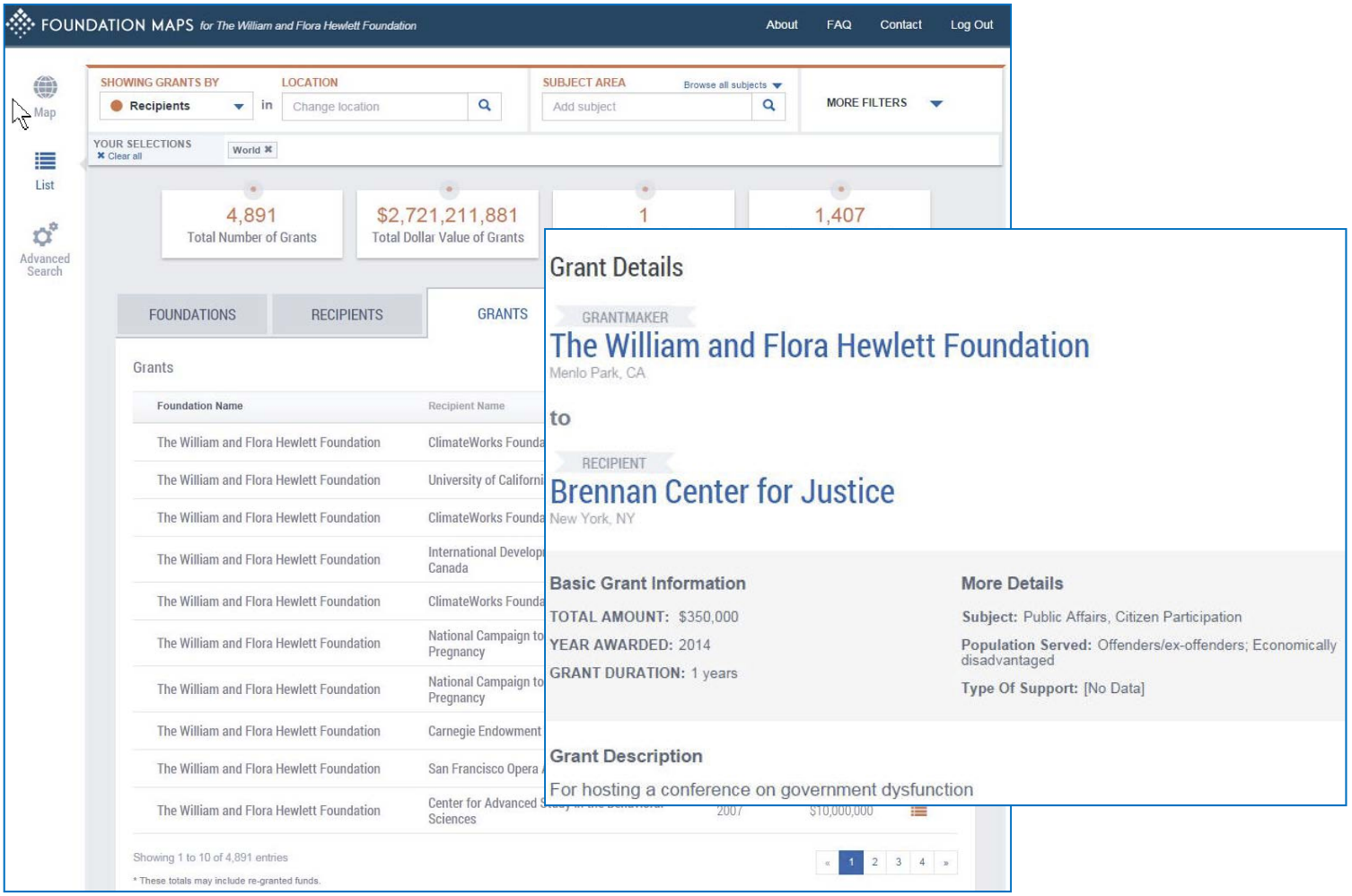
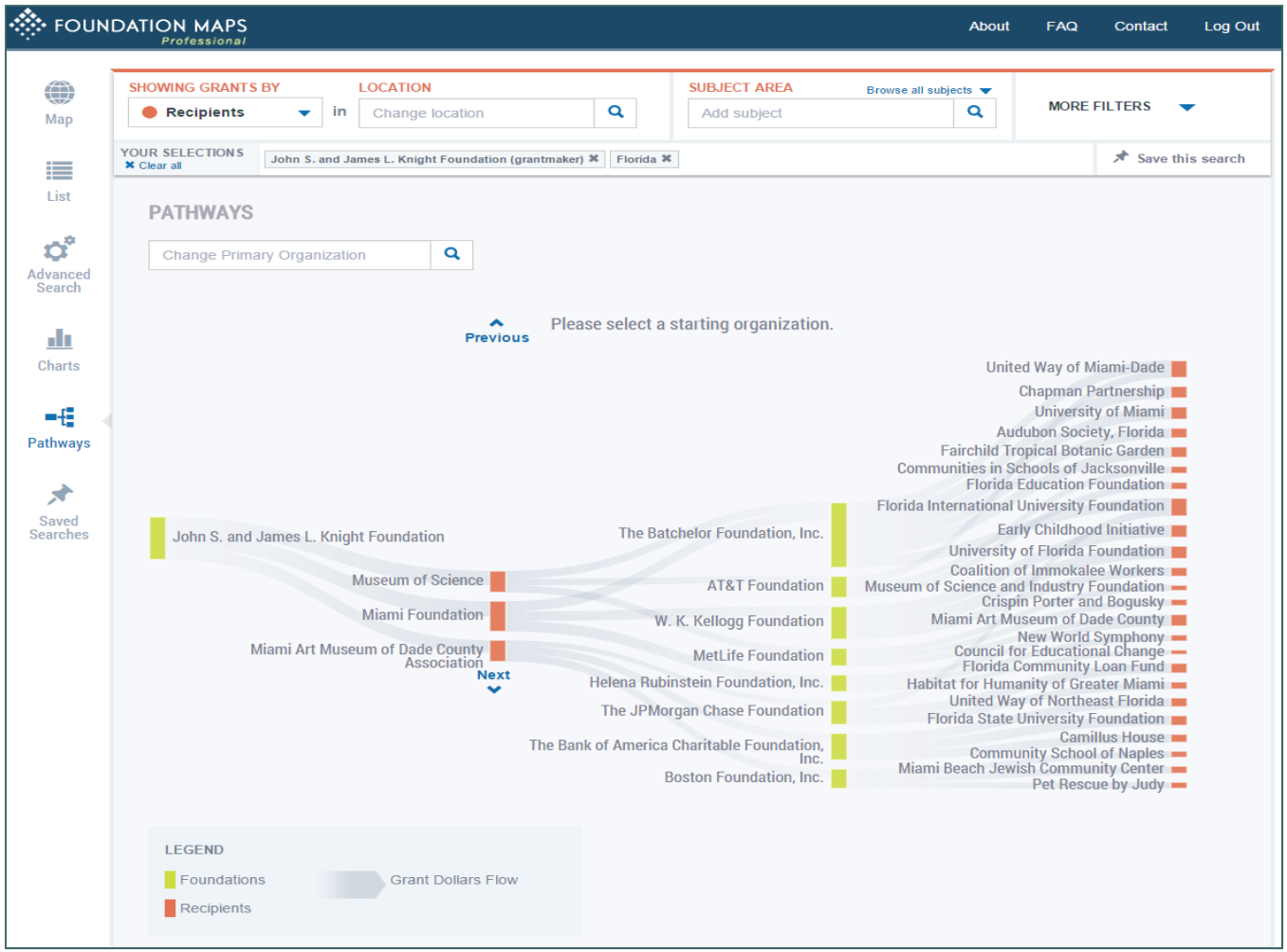
New release in September 2014

Foundation Maps List and Detail View

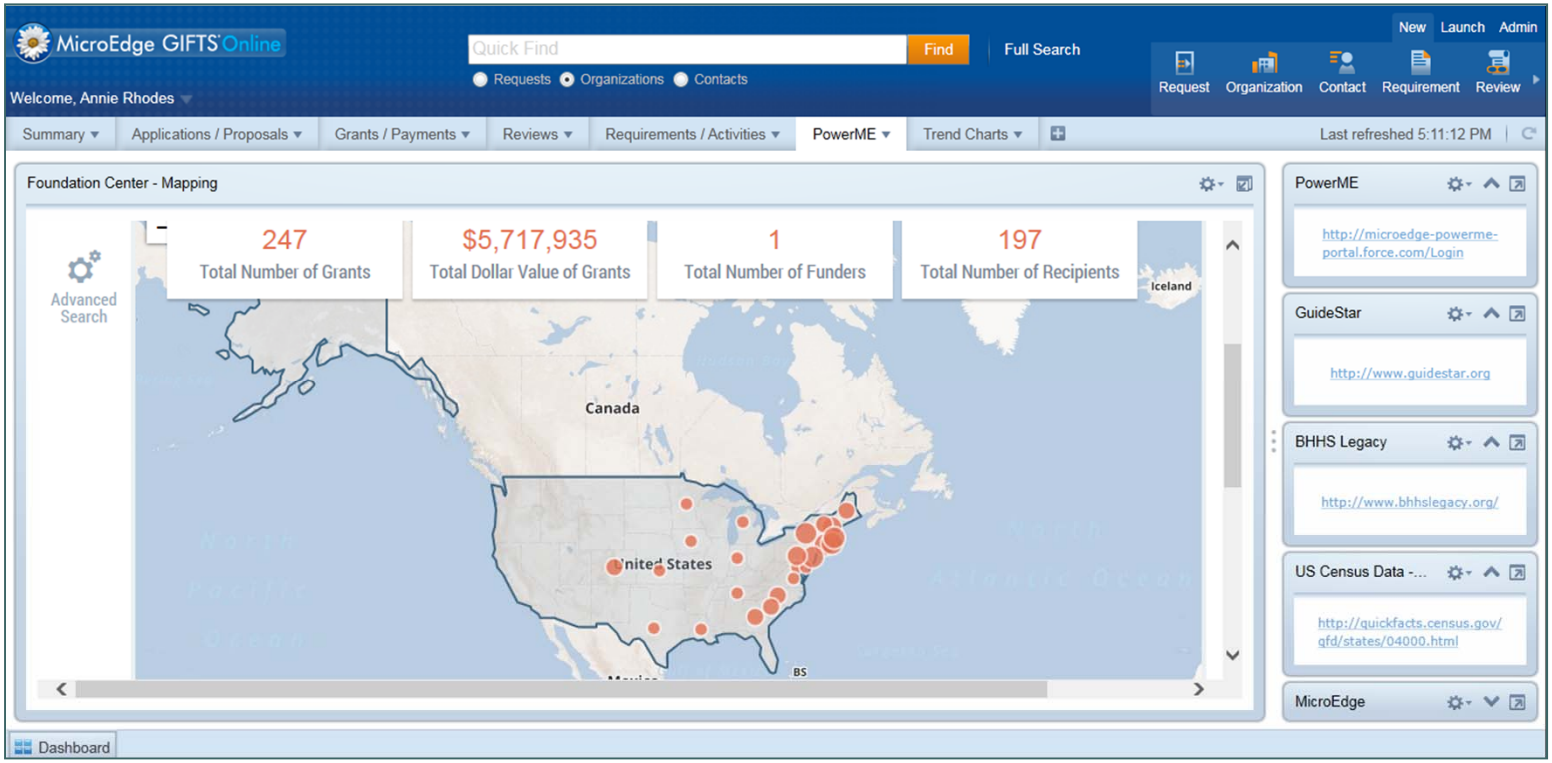


New release in September 2014

Foundation Maps Pathways



An Integrated Map of Your Grants



This uses the Foundation Center's new Foundation Maps

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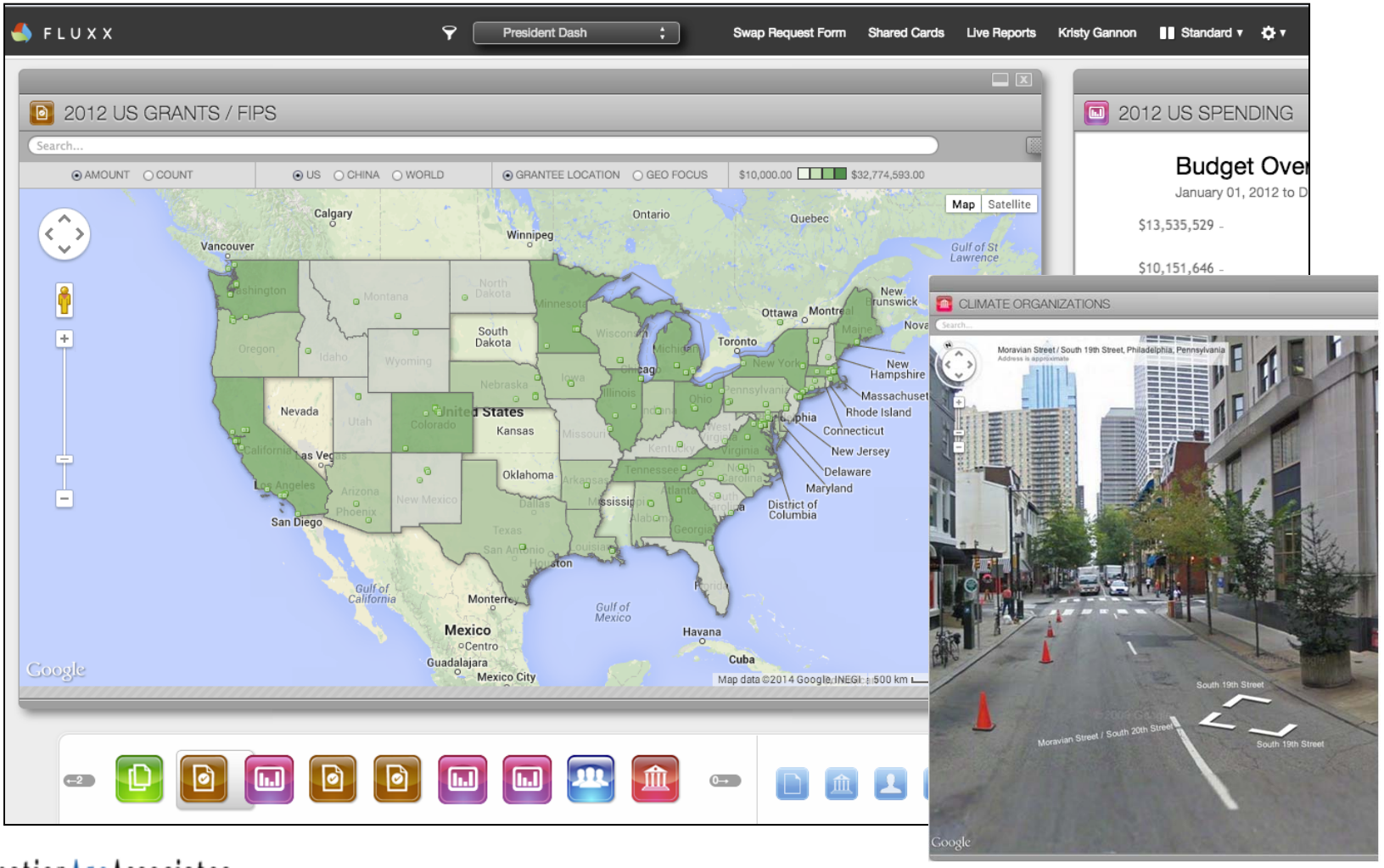
A Built-in System Map Showing Your Grants



Simplify from GuideStar and TAG

simplify
Less process. More purpose.

- Organization information
- Mission and impact statement
- Demographic coding
- Financial information
- People/contact information
- Uploaded documents
- IRS information

Simplify is a data-sharing tool that streamlines the grants application process for nonprofits.

It eliminates the repetitive elements of grant applications.

FLUXX

MicroEdge

roundCorner

smartsimple

Simplify in Development

Altum

Bromelkamp Company

FOUNDANT technologies

Versaic

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Source: http://www.simplifynow.org/

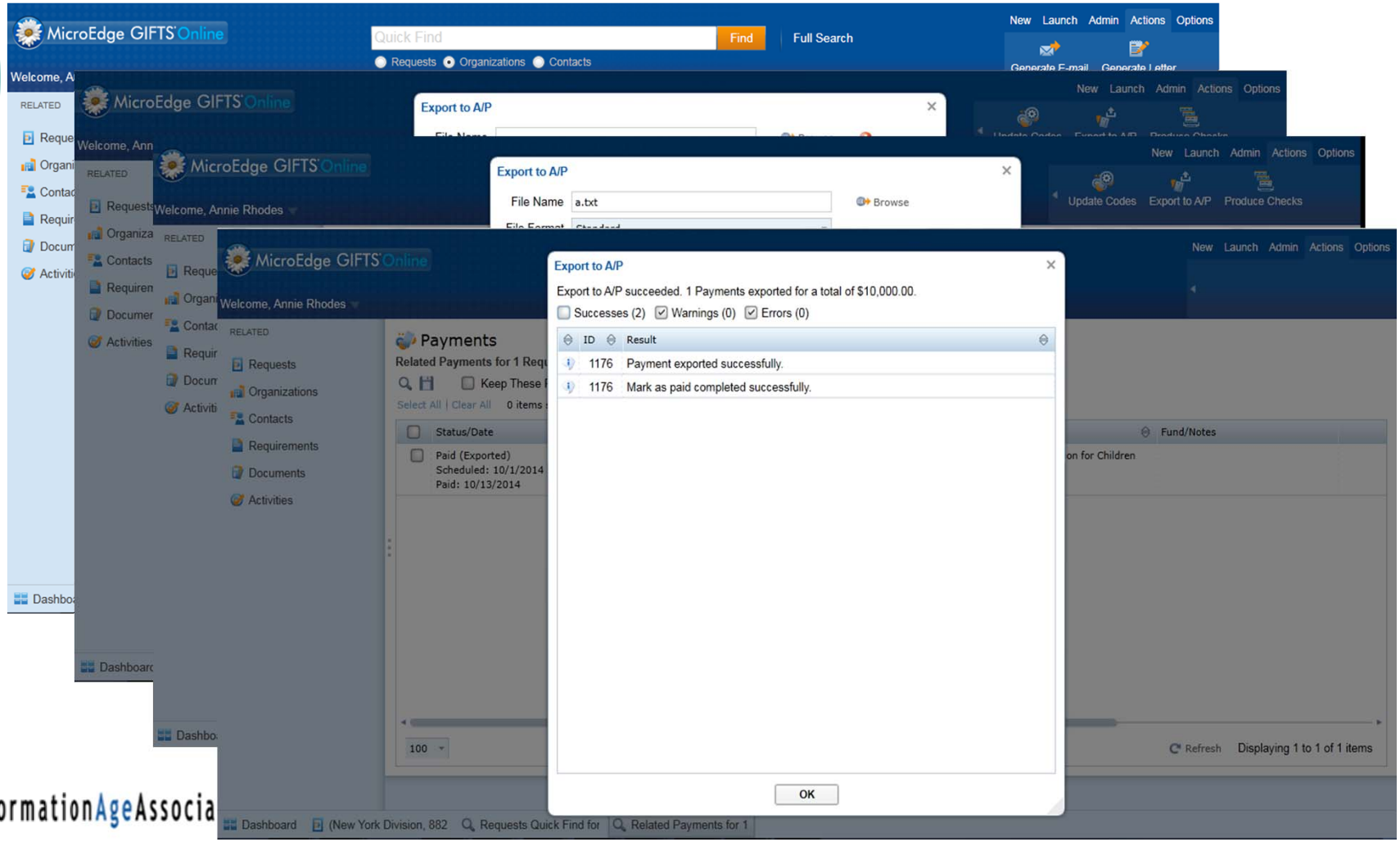
Links to AP and Payments

Automated Links to Accounts Payable Systems

- Bidirectional links to Account Payable (AP) systems and services
- Why are most accounting departments very reluctant to use this?
- Why are most AP links deliberately semi-automatic requiring a manual export/import process?

The 3 most common AP packages used by U.S. foundations

A Four-step Payment Export to your AP system



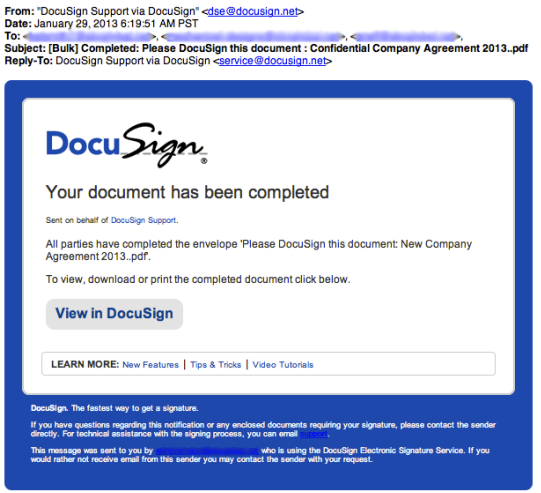
InformationAgeAssocia

Electronic Document Signing

Electronic Signature Providers

DocuSign

SIGNORITY



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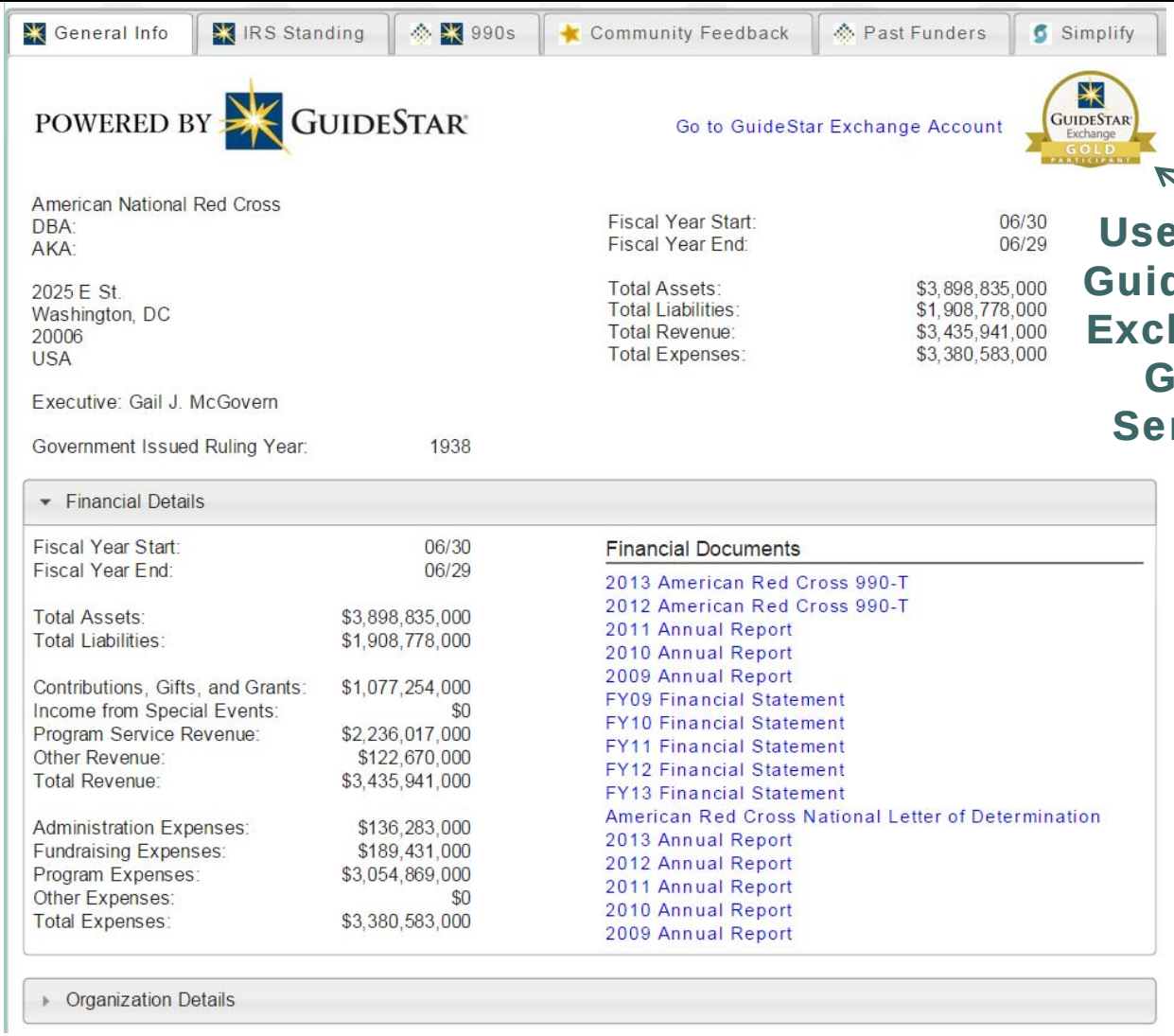
Nonprofit Information and Ratings

Integrating GuideStar Data into *Your System*

FOUNDANT technologies



Uses the GuideStar Exchange Gold Service

This works via an API provided by GuideStar

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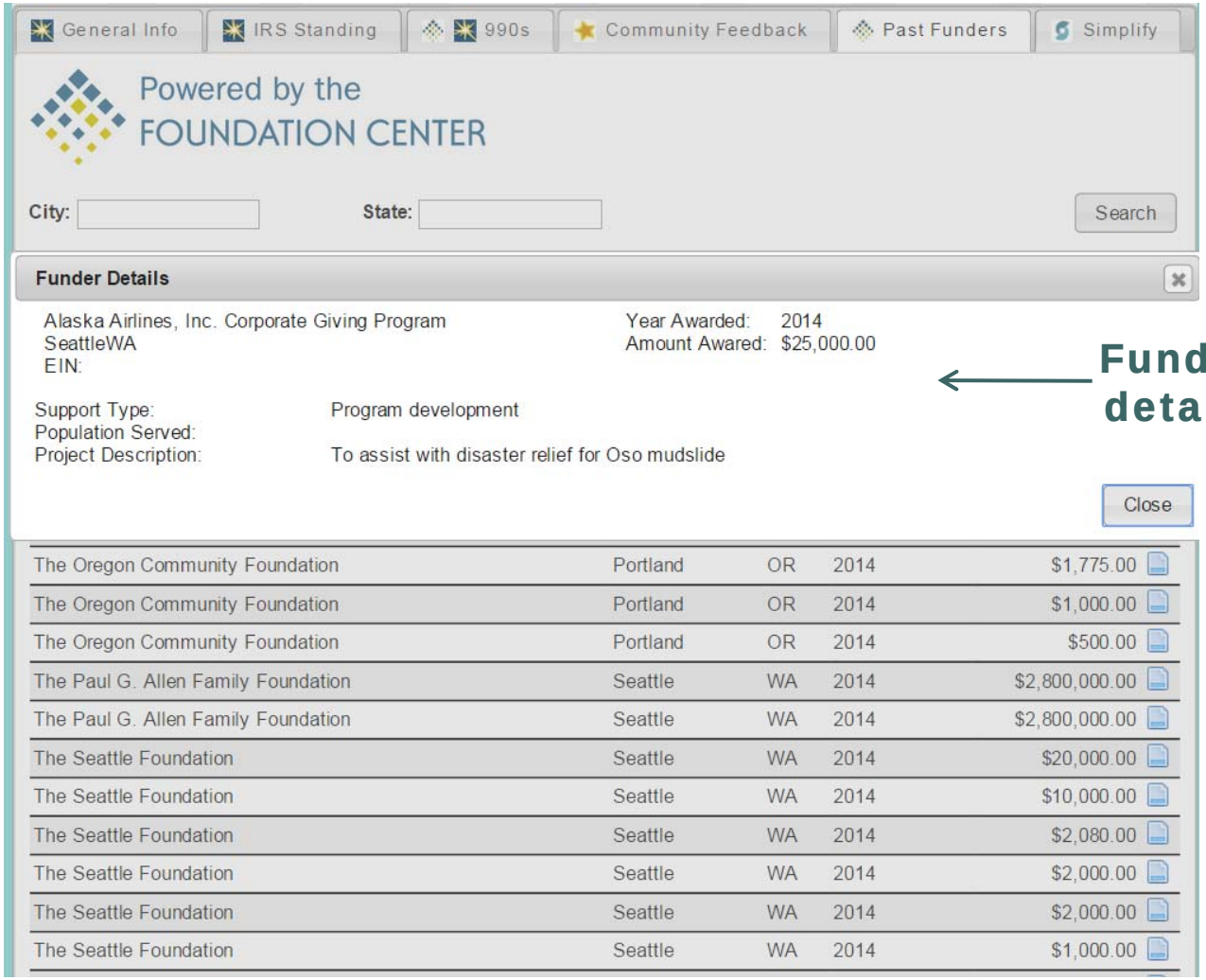
Seeing in *Your System* Who Else Funds Your Nonprofits

FOUNDANT technologies

This works via an API provided by the Foundation Center



The Oregon Community Foundation	Portland	OR	2014	$1,775.00
The Oregon Community Foundation	Portland	OR	2014	$1,000.00
The Oregon Community Foundation	Portland	OR	2014	$500.00
The Paul G. Allen Family Foundation	Seattle	WA	2014	$2,800,000.00
The Paul G. Allen Family Foundation	Seattle	WA	2014	$2,800,000.00
The Seattle Foundation	Seattle	WA	2014	$20,000.00
The Seattle Foundation	Seattle	WA	2014	$10,000.00
The Seattle Foundation	Seattle	WA	2014	$2,080.00
The Seattle Foundation	Seattle	WA	2014	$2,000.00
The Seattle Foundation	Seattle	WA	2014	$2,000.00
The Seattle Foundation	Seattle	WA	2014	$1,000.00

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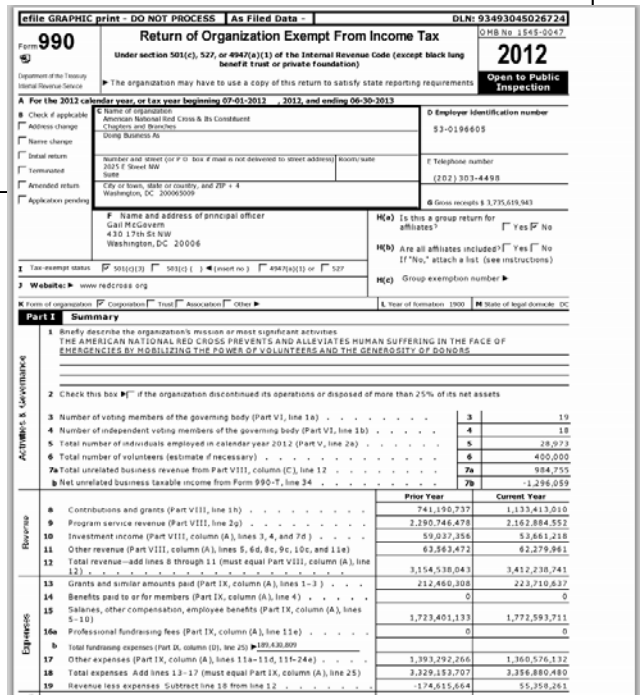
Viewing Your Nonprofit's 990 Online in Your System

FOUNDANT technologies


efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493045026724

Form 990 — Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

OMB No. 1545-0047 — 2012 — Open to Public Inspection

► The organization may have to use a copy of this return to satisfy state reporting requirements

A For the 2012 calendar year, or tax year beginning 07-01-2012 , 2012, and ending 06-30-2013

C Name of organization: American National Red Cross & Its Constituent Chapters and Branches

D Employer identification number: 53-0196605

Doing Business As

Number and street (or P O box if mail is not delivered to street address): 2025 E Street NW, Suite

Room/suite

E Telephone number: (202) 303-4498

City or town, state or country, and ZIP + 4: Washington, DC 200065009

G Gross receipts $ 3,735,619,943

F Name and address of principal officer: Gail McGovern, 430 17th St NW, Washington, DC 20006

H(a) Is this a group return for affiliates? Yes No

H(b) Are all affiliates included? Yes No. If "No," attach a list (see instructions)

H(c) Group exemption number ►

I Tax-exempt status: 501(c)(3) 501(c) ( ) ◄ (insert no) 4947(a)(1) or 527

J Website: ► www.redcross.org

K Form of organization: Corporation Trust Association Other ►

L Year of formation: 1900

M State of legal domicile: DC

Part I Summary

1 Briefly describe the organization's mission or most significant activities: THE AMERICAN NATIONAL RED CROSS PREVENTS AND ALLEVIATES HUMAN SUFFERING IN THE FACE OF EMERGENCIES BY MOBILIZING THE POWER OF VOLUNTEERS AND THE GENEROSITY OF DONORS

2 Check this box ► if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	19
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	18
5	Total number of individuals employed in calendar year 2012 (Part V, line 2a)	5	28,973
6	Total number of volunteers (estimate if necessary)	6	400,000
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	984,755
b	Net unrelated business taxable income from Form 990-T, line 34	7b	-1,296,059

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	741,190,737	1,133,413,010
9	Program service revenue (Part VIII, line 2g)	2,290,746,478	2,162,884,552
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	59,037,356	53,661,218
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	63,563,472	62,279,961
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	3,154,538,043	3,412,238,741
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	212,460,308	223,710,637
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	1,723,401,133	1,772,593,711
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ►189,430,809		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	1,393,292,266	1,360,576,132
18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	3,329,153,707	3,356,880,480
19	Revenue less expenses Subtract line 18 from line 12	-174,615,664	55,358,261

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Seeing in *Your System*
External Ratings of Nonprofits

FOUNDANT technologies

This works via an API provided by Great Nonprofits

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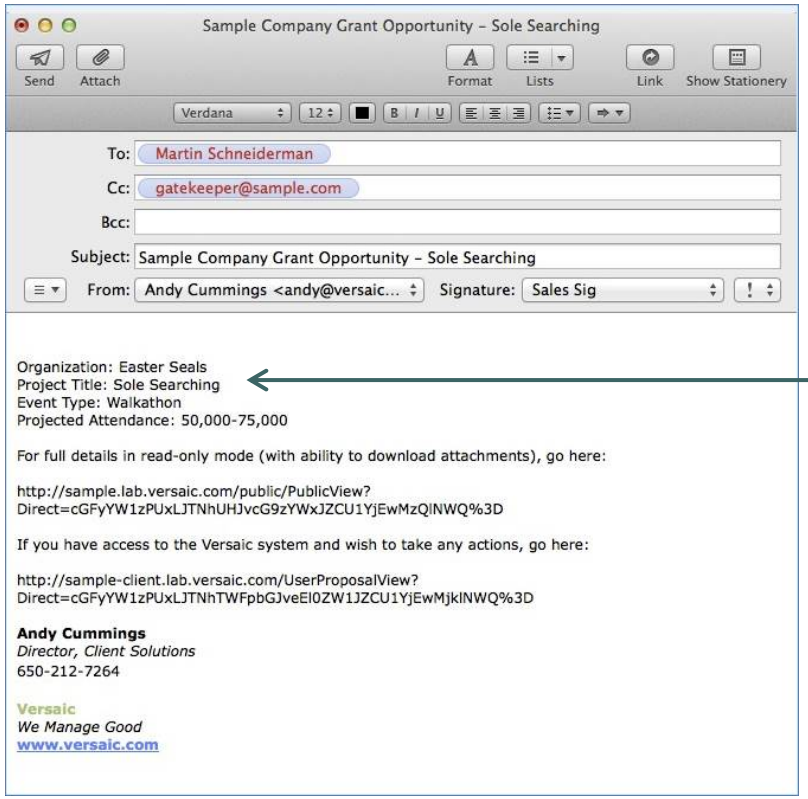
External E-mail Transmission and Broadcasting

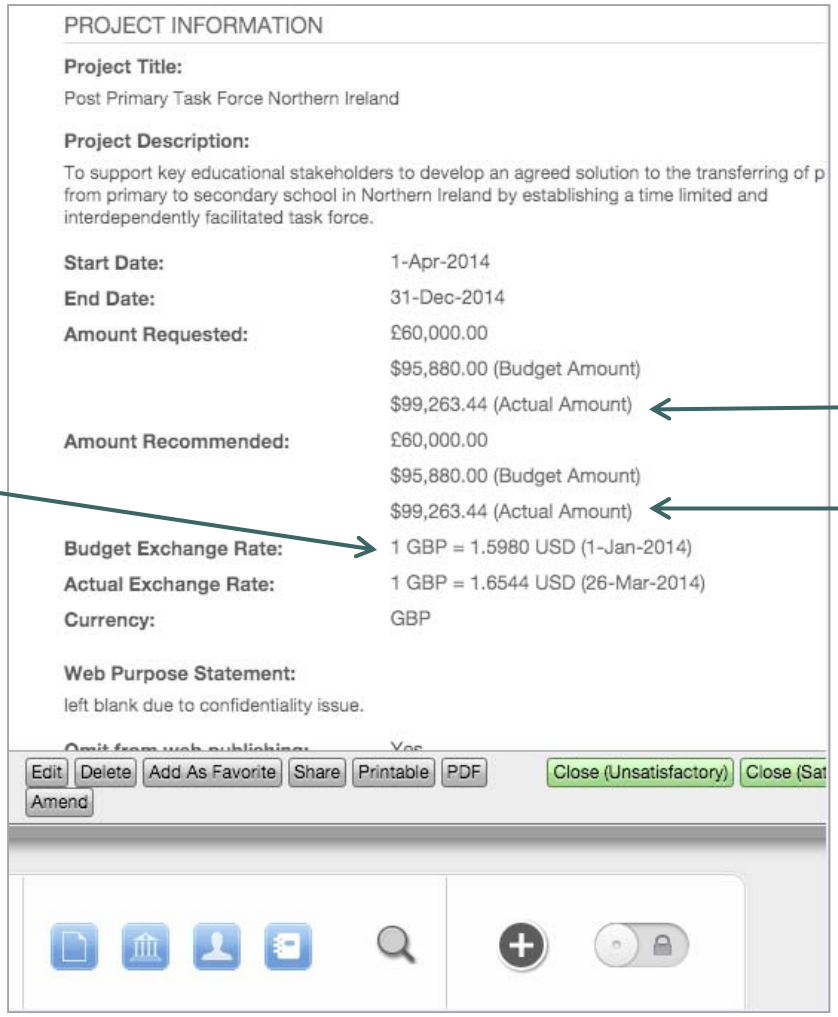


Auto mailmerged fields of data

Issues with E-mail Transmissions Using Hosted Systems

- Discrepancy in naming = *recipient junk mail filtering*
- Will your e-mail service with an auto-link to your hosted grants management systems really work?
- Limits on length of batch e-mail addressee lists
  - Limits of using your e-mail system
  - Using selected external broadcast e-mail services that don't have problems

Auto Currency Conversion Using External Sources



Budget exchange rates

Requested amount in $US currency

Converted amount in Northern Ireland currency

Key Factors in API Success

- Business
  - Overcoming technical API barriers and data issues.
  - The cost of fee-based Charity Check is pre-bundled into *some* systems = a big $ savings for some grantmakers.
- Technical
  - All APIs were good and easy to use.
  - Almost all API data came in raw format - we then reformat it to display in our system.
  - We designed our screens for data presentation.

Key Factors in API Success

- Foundation Center's API and imported data was especially well designed and easy to use.
- GuideStar and Great Nonprofits data sets are very large.

- Contracts
  - All partner and our licensing agreements understandably include disclaimers, *"Use at your own risk"*. "It's a little risk for us, but OK."
  - Mutually negotiated agreeable price points to resell partner services in bulk formats.
  - No fees for individual transactions.

API Challenges and Obstacles

- Report data problems ASAP. It's best to fixed issues at source vs. later applying Band-Aids.
- Concern when the source data format or content changes then the API feed won't work properly anymore.
- Foundation Center API and data had zero issues! It's clearly the most complete and consistently formatted data.
- We expect that the biggest objection from grantmakers will be that partner data sets are empty in parts.

API Challenges and Obstacles

- We don't know about data accuracy and inconsistencies with some data formats
- We've received expressed concern about external nonprofit reviews. There's fear about comments from unhappy constituents and disgruntled employees.

Time for spirited questions!

See the
Information Age Associates
Web site for more
up to date information

http://www.iaa.com