GMN
Grants Managers Network

# Selecting and Implementing Cloud Based Integrated Foundation Information Systems

Cloud
MOVING DAY

March 17, 2014

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InformationAgeAssociates

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# Topics We'll Cover

- Key concepts, terminology and security
- The current marketplace
- Advantages of moving online to a fully Web-based system
- Questions about moving to a fully Web-based system
- How to select and migrate successfully
- Q&A

# Key Concepts, Technology and Security Impacting Foundation Information Systems

# Technology Trends Impacting Foundation Information Systems in 2014

- Web based portals with easier, differentiated, and personalized user interfaces (UI)

- Expanded use of online applications and online grantee reporting
- Migration to *hosted* cloud based systems

- No more open source grantmaking systems
- Quickly growing use of iPad tablets
- Growing use of iPhone and Android smartphones

# Technology Trends Impacting Foundation Information Systems

- More, faster and better broadband Internet access worldwide
- Increased telecommuting by senior management and program staff
- Quickly expanding multi-tenant cloud computing
- Multiple browser types and versions plus 32 and 64-bit Windows 7 and 8 makes system development, integration and support more difficult

Windows 7

Windows 8

# Lasting Companies Know How to Re-invent Themselves

*"Lasting companies know how to re-invent themselves.*

*You've got to reinvent the company to do some other thing, like consumer products or devices.*

*You've got to be like a butterfly and have a metamorphosis."*

Mike Markkula, right, Apple's first investor and father figure to Jobs.

Fired by Jobs in 1997 his parting advice called for re-invention.

Source: Mike Markkula – Apple's first investor

*Source: Excerpt from Walter Isaacson's Steve Jobs, page 320*

# Different Types of Foundation Services

1. All Microsoft Windows
2. All Microsoft Windows and accessible from inside a browser using remote access programs *(e.g. Windows Terminal Server, Citrix GoToMyPC or XenApp, or Windows Remote Desktop Connection)*
3. Hybrid Windows and Web browser
4. Fully Web browser

# Bring Your Own Device

BYOD
device
mobile
notebook
tablet
laptop
bring
technology
system
smartphone
communication
channel
sharing
networking
networks
wireless

- Many foundations are now allowing staff to work on their own personal devices.
- "Microsoft rose to dominance in an age when the CIO (chief information officer) really held the keys to IT decision making. Over the past five years, BYOD has really eroded the level of control that many CIOs have."*

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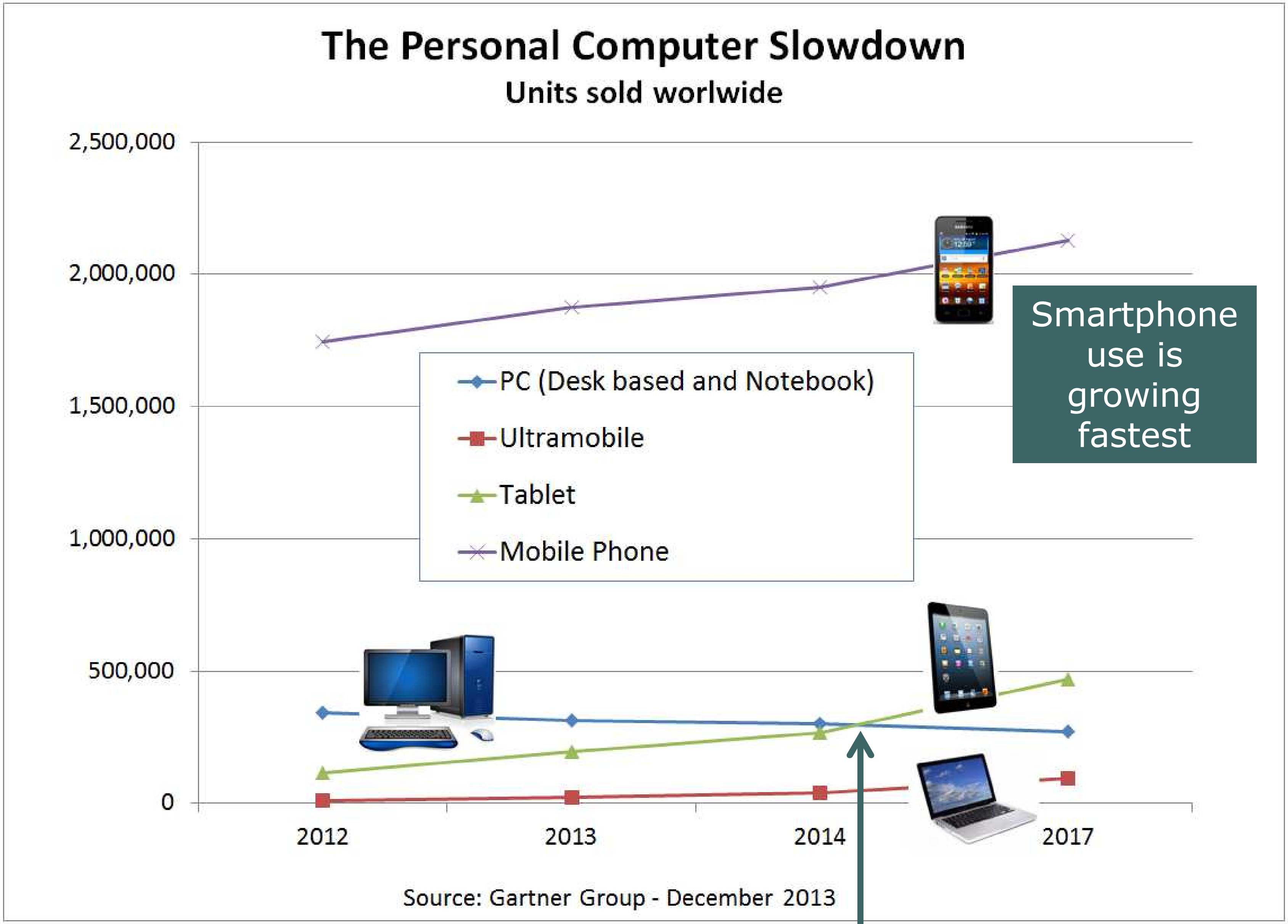
*Source:* Adam Tratt, a former Microsoft Office executive, Reuters 3/16/2014



# The Personal Computer Slowdown

**Units sold worlwide**

Source: Gartner Group - December 2013

Smartphone use is growing fastest

More tablets sold worldwide than desktop computers

# Location and Platform Differences

## Location

- In-house on your server(s)
- On remotely hosted servers

## Platform

- Practically all of the system provided by ONE vendor
- The core platform provided by one vendor plus the grants management system and utilities each provided by DIFFERENT vendors

# Is it all **ours** or is it **shared**?

**All ours**

1. On a hosted server that is used ONLY by your organization
2. Your data always stored in YOUR OWN DATABASE

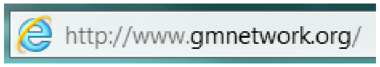
**Shared**

1. On a hosted server that is SHARED by many organizations
2. Your data stored in a SHARED DATABASE (just as the bank does)

# Remote System Security

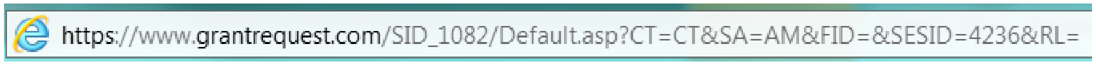
- **H**ypertext **T**ransfer **P**rotocol **S**ecure (**HTTPS**) is a widely used and a **MUST HAVE** communications protocol for secure communication over a computer network such as the Internet.

  HTTP =

  http://www.gmnetwork.org/

  HTTPS =

  https://www.grantrequest.com/SID_1082/Default.asp?CT=CT&SA=AM&FID=&SESID=4236&RL=

- Authenticated Single Sign On (**SSO**) restricts remote system access to computers from a specified location. It’s used mostly by corporate grantmakers.

# Local Windows Applications vs. Hosted Web-based Applications

Microsoft Office + **Microsoft Outlook**

**OR**

Microsoft Office 365

Google docs

Outlook

Google Mail

*"In a recent report, Gartner, the information technology research company, called Google "the only strong competitor" to Microsoft in cloud-based business productivity software . . ."*

SOURCE: New York Times, December 26, 2012
http://www.nytimes.com/2012/12/26/technology/google-apps-moving-onto-microsofts-business-turf.html?hpw&_r=0&pagewanted=all

# 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

{g} Good Done Great

Grantium inc
A Division of CSDC Systems Inc.

GrantStream®
Helping Companies Help Communities

JK Group Inc.

Micro Edge
MicroEdge®

mosaic™
social innovation through technology, evaluation and research

npower
bringing the tech community together for social good

philanTECH

smartsimple

Stellar Technology Solutions, LLC.

Versaic
We Manage Good

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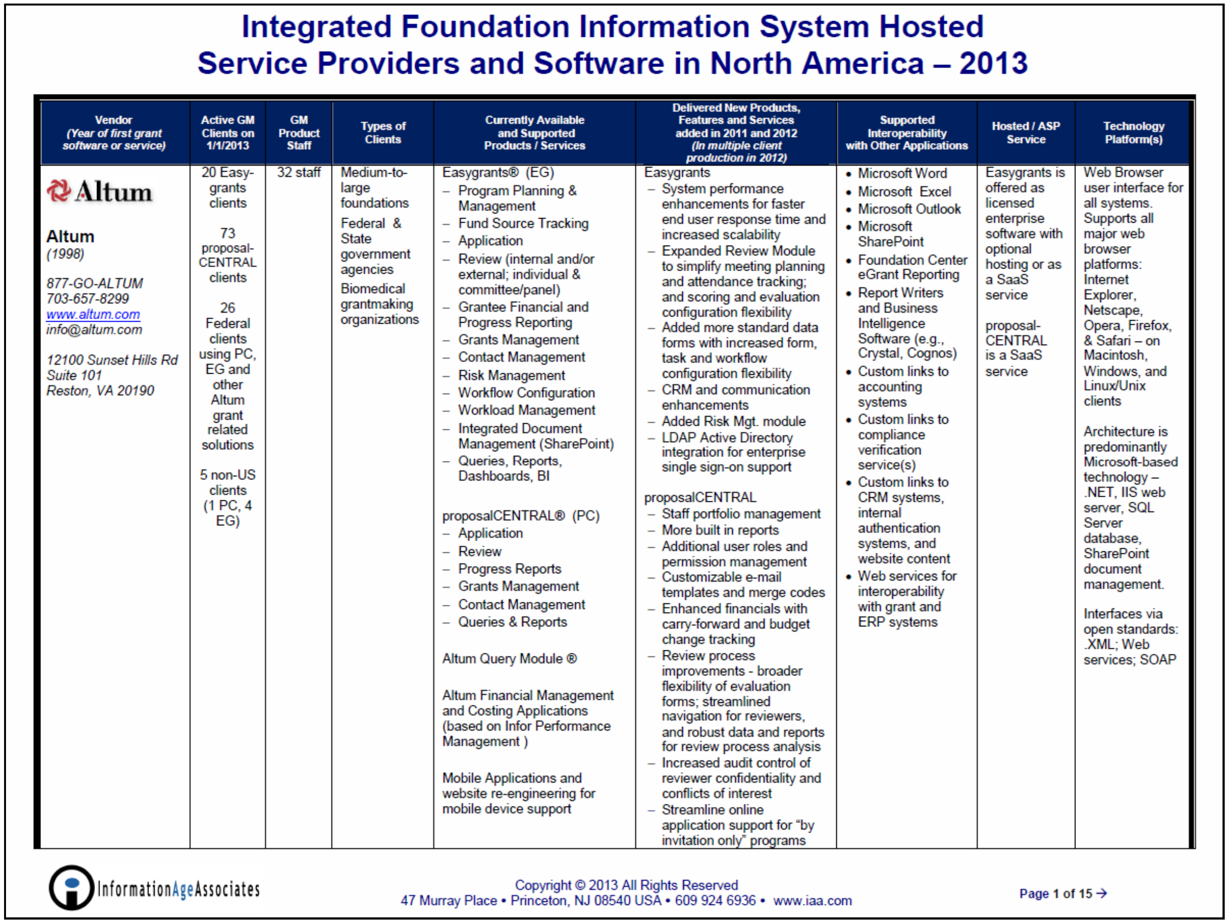
WESTAF

wizehive

ZoomGrants

# Review the “Hosted Service” and “Technology Platform(s)”



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

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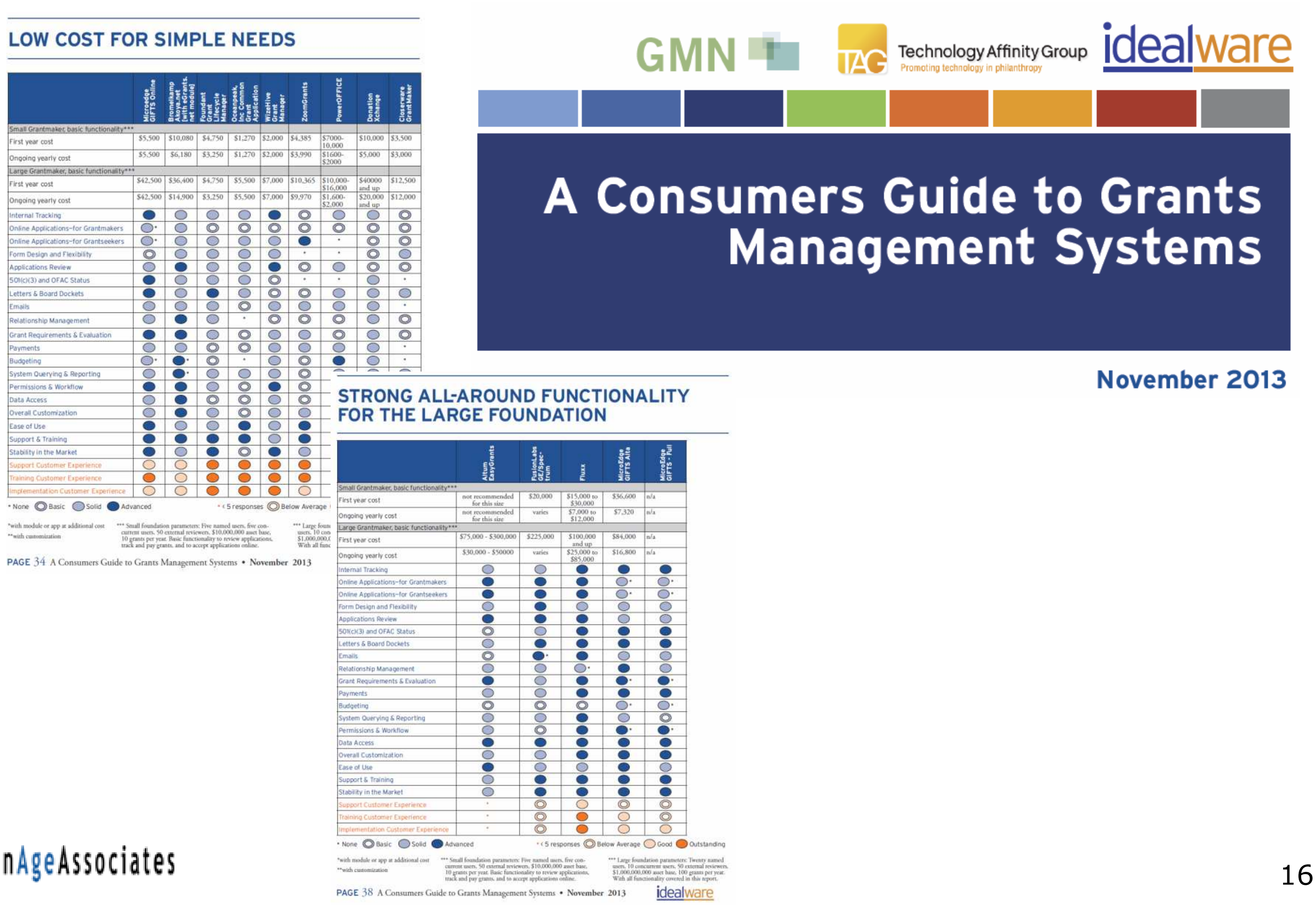
**5,057**
U.S.
grantmakers
reported

**332**
non-U.S.
grantmakers
Reported

SOURCE: http://www.iaa.com/resources.html

# The Latest 2013 Consumer's Guide



## LOW COST FOR SIMPLE NEEDS

| | Microedge GIFTS Online | Bromelkamp Akoya.net [with eGrants.net module] | Foundant Grant Lifecycle Manager | Oceanpeak, Inc Common Grant Application | WizeHive Grant Manager | ZoomGrants | PowerOFFICE | Donation Xchange | Closerware GrantMaker |
|---|---|---|---|---|---|---|---|---|---|
| Small Grantmaker, basic functionality*** | | | | | | | | | |
| First year cost | $5,500 | $10,080 | $4,750 | $1,270 | $2,000 | $4,385 | $7000-10,000 | $10,000 | $3,500 |
| Ongoing yearly cost | $5,500 | $6,180 | $3,250 | $1,270 | $2,000 | $3,990 | $1600-$2000 | $5,000 | $3,000 |
| Large Grantmaker, basic functionality*** | | | | | | | | | |
| First year cost | $42,500 | $36,400 | $4,750 | $5,500 | $7,000 | $10,365 | $10,000-$16,000 | $40000 and up | $12,500 |
| Ongoing yearly cost | $42,500 | $14,900 | $3,250 | $5,500 | $7,000 | $9,970 | $1,600-$2,000 | $20,000 and up | $12,000 |
| Internal Tracking | ● | ◍ | ◍ | ◍ | ● | ◎ | ◍ | ◍ | ◎ |
| Online Applications–for Grantmakers | ◍* | ◍ | ◎ | ◎ | ◎ | ◎ | ◎ | ◎ | ◎ |
| Online Applications–for Grantseekers | ◍* | ◍ | ◍ | ◍ | ◍ | ● | • | ◎ | ◎ |
| Form Design and Flexibility | ◎ | ◍ | ◍ | ◍ | ◍ | • | • | ◎ | ◍ |
| Applications Review | ◍ | ● | ◍ | ◍ | ● | ◎ | ◍ | ◎ | ◎ |
| 501(c)(3) and OFAC Status | ● | ◍ | ◍ | ◍ | ◎ | • | • | ◍ | • |
| Letters & Board Dockets | ● | ◍ | ● | ◍ | ◎ | ◎ | ◍ | ◍ | ◍ |
| Emails | ◍ | ◍ | ◍ | ◎ | ◍ | ◍ | ◍ | ◍ | • |
| Relationship Management | ◍ | ● | ◍ | • | ◎ | ◎ | ◎ | ◍ | ◎ |
| Grant Requirements & Evaluation | ● | ● | ◍ | ◎ | ◍ | ◍ | ◎ | ◍ | ◎ |
| Payments | ◍ | ◍ | ◎ | ◎ | ◍ | ◍ | ◍ | ◍ | • |
| Budgeting | ◍* | ●* | ◎ | • | ◍ | ◎ | ● | ◍ | • |
| System Querying & Reporting | ◍ | ●* | ◍ | ◍ | ◍ | ◎ | | | |
| Permissions & Workflow | ● | ● | ◍ | ◎ | ● | ◎ | | | |
| Data Access | ◍ | ● | ◎ | ◎ | ◍ | ◎ | | | |
| Overall Customization | ◍ | ● | ◍ | ◎ | ◍ | ◍ | | | |
| Ease of Use | ● | ◍ | ◍ | ● | ◍ | ● | | | |
| Support & Training | ● | ● | ● | ● | ◍ | ● | | | |
| Stability in the Market | ● | ◍ | ● | ◎ | ● | ◍ | | | |
| Support Customer Experience | ◍ | ◍ | ● | ● | ● | ● | | | |
| Training Customer Experience | ● | ◍ | ● | ● | ● | ● | | | |
| Implementation Customer Experience | ◍ | ◍ | ● | ● | ● | ◍ | | | |

• None ◎ Basic ◍ Solid ● Advanced • < 5 responses ◎ Below Average

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foun
users, 10 con
$1,000,000,
With all func

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GMN

Technology Affinity Group
Promoting technology in philanthropy

idealware

# A Consumers Guide to Grants Management Systems

November 2013

## STRONG ALL-AROUND FUNCTIONALITY FOR THE LARGE FOUNDATION

| | Altum EasyGrants | FusionLabs GE/Spectrum | Fluxx | MicroEdge GIFTS Alta | MicroEdge GIFTS - Full |
|---|---|---|---|---|---|
| Small Grantmaker, basic functionality*** | | | | | |
| First year cost | not recommended for this size | $20,000 | $15,000 to $30,000 | $36,600 | n/a |
| Ongoing yearly cost | not recommended for this size | varies | $7,000 to $12,000 | $7,320 | n/a |
| Large Grantmaker, basic functionality*** | | | | | |
| First year cost | $75,000 - $300,000 | $225,000 | $100,000 and up | $84,000 | n/a |
| Ongoing yearly cost | $30,000 - $50000 | varies | $25,000 to $85,000 | $16,800 | n/a |
| Internal Tracking | ◍ | ◍ | ● | ● | ● |
| Online Applications–for Grantmakers | ● | ● | ● | ◍* | ◍* |
| Online Applications–for Grantseekers | ● | ● | ● | ◍* | ◍* |
| Form Design and Flexibility | ◍ | ● | ◍ | ◍ | ◍ |
| Applications Review | ● | ● | ● | ◍ | ◍ |
| 501(c)(3) and OFAC Status | ◎ | ◍ | ● | ● | ● |
| Letters & Board Dockets | ◍ | ● | ● | ● | ● |
| Emails | ◎ | ●* | ● | ◍ | ◍ |
| Relationship Management | ◍ | ◍ | ◍* | ● | ◍ |
| Grant Requirements & Evaluation | ● | ◍ | ● | ●* | ●* |
| Payments | ◍ | ◍ | ● | ● | ● |
| Budgeting | ◎ | ◎ | ◎ | ◍* | ◍* |
| System Querying & Reporting | ◍ | ◍ | ● | ◍ | ◎ |
| Permissions & Workflow | ◍ | ◎ | ● | ●* | ●* |
| Data Access | ● | ● | ● | ● | ● |
| Overall Customization | ◍ | ◍ | ● | ● | ● |
| Ease of Use | ● | ◍ | ◍ | ● | ◍ |
| Support & Training | ◍ | ● | ● | ● | ● |
| Stability in the Market | ◍ | ● | ● | ● | ● |
| Support Customer Experience | • | ◎ | ◍ | ◎ | ◎ |
| Training Customer Experience | • | ◎ | ● | ◍ | ◎ |
| Implementation Customer Experience | • | ◎ | ● | ◍ | ◍ |

• None ◎ Basic ◍ Solid ● Advanced • < 5 responses ◎ Below Average ◍ Good ● Outstanding

*with module or app at additional cost

**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, $10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, $1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.

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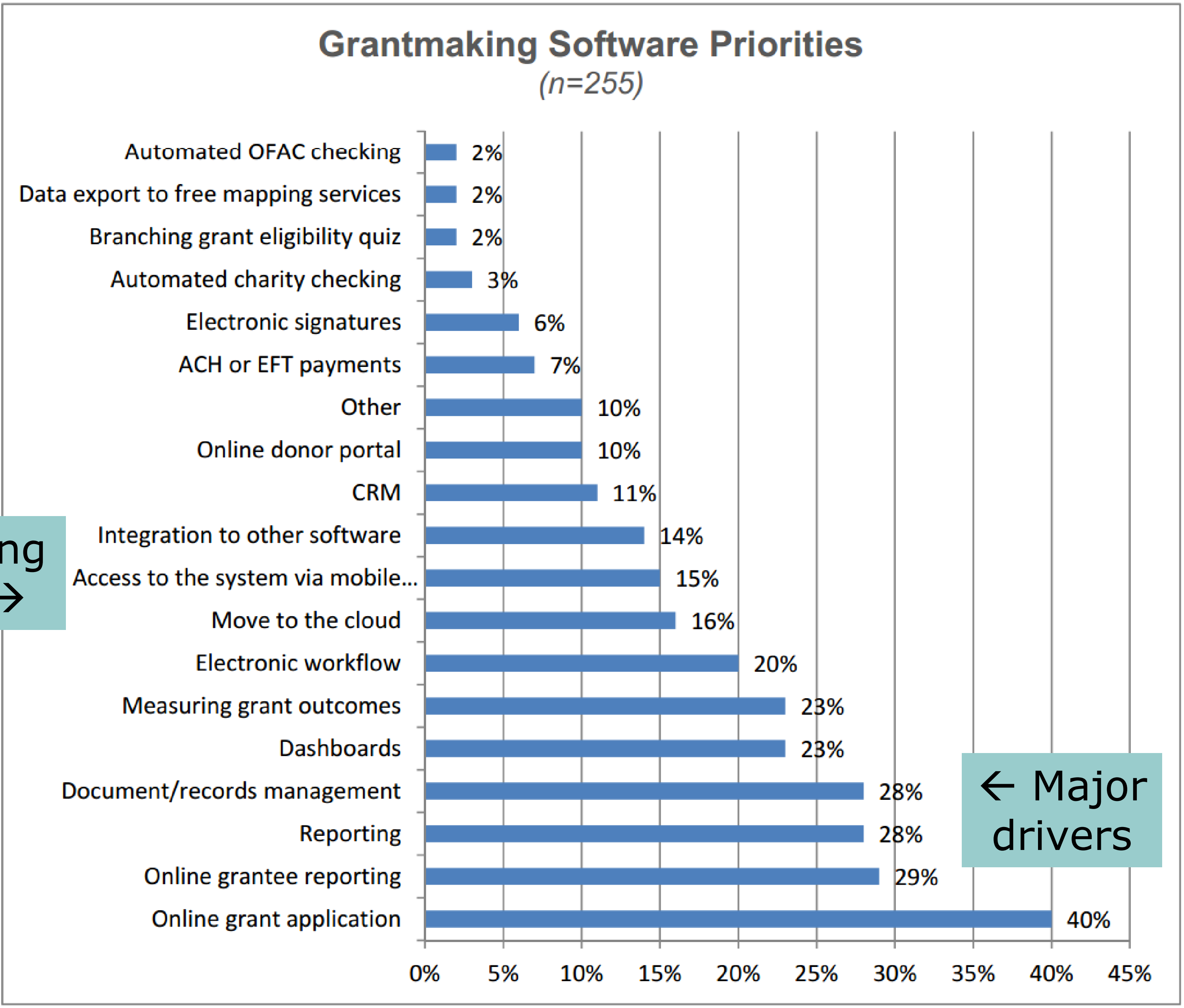

Growing fast →

← Major drivers

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*Source: GMN-TAG 2012 Grantmakers Information Technology Survey Report*

# The Hosted System Options

| | | |
|---|---|---|
| Today's systems | Basic system with limited flexibility | Highly customized one-of-a-kind system |
| Some of Today's Systems and Tomorrow's opportunity | More flexible open personalized *(not customized)* fully Web-based systems that can be enhanced and linked to other applications and data | |

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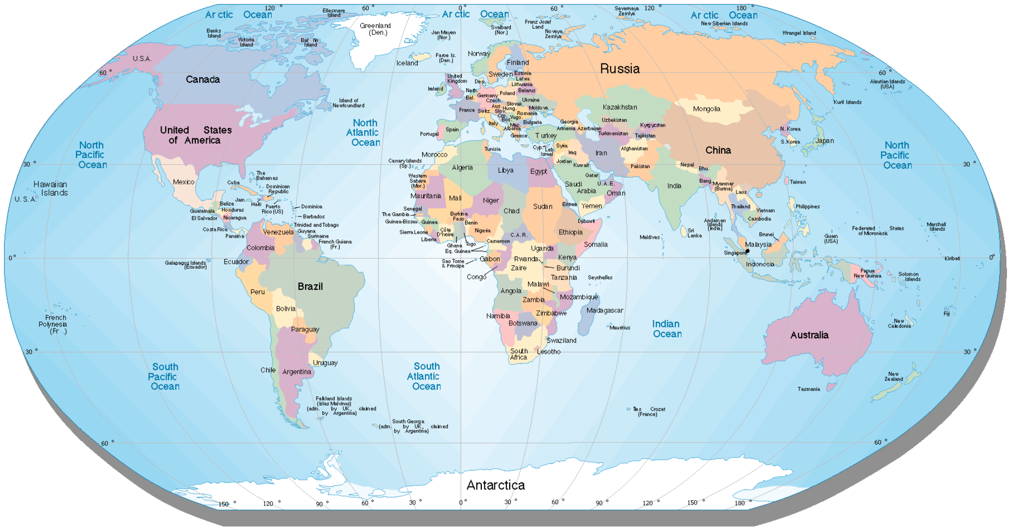
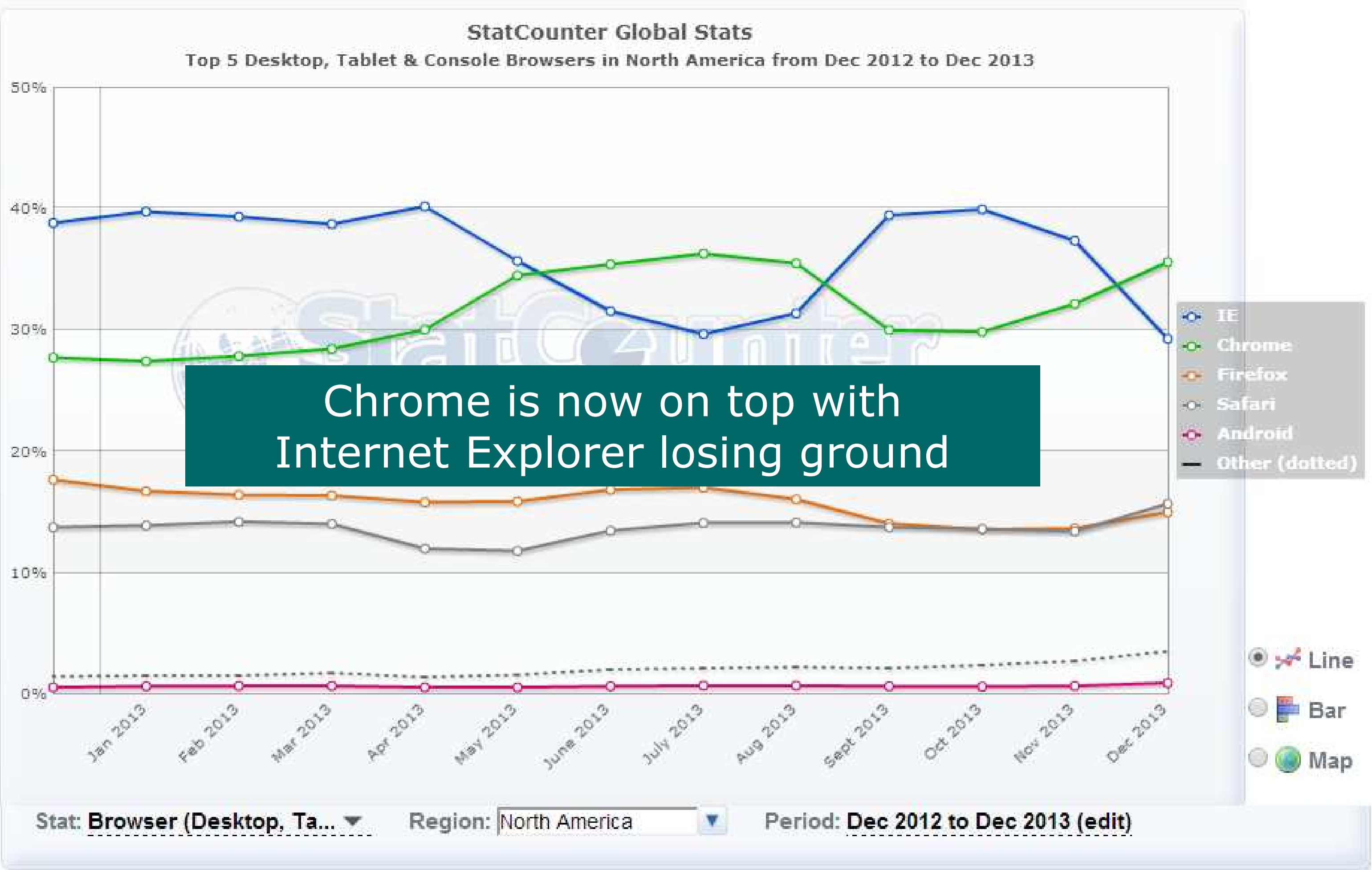
# *Fully tested and supported* compatibility with all PC and Mac Web browsers worldwide is very Important


Arctic Ocean
Arctic Ocean
Arctic Ocean
Greenland (Den.)
Canada
U.S.A.
Russia
United States of America
North Pacific Ocean
North Atlantic Ocean
North Pacific Ocean
Hawaiian Islands U.S.A.
Mexico
Kazakhstan
Mongolia
China
India
Japan
Brazil
Peru
Bolivia
Argentina
Chile
Colombia
Venezuela
Ecuador
Paraguay
Uruguay
Algeria
Libya
Egypt
Sudan
Chad
Niger
Mali
Mauritania
Ethiopia
Somalia
Kenya
Tanzania
Zaire
Angola
Zambia
Namibia
Botswana
South Africa
Mozambique
Madagascar
Saudi Arabia
Iran
Indonesia
Malaysia
Australia
New Zealand
Indian Ocean
South Pacific Ocean
South Atlantic Ocean
French Polynesia (Fr.)
Antarctica

# Browser Use in **North America**



Stat: Browser (Desktop, Ta...

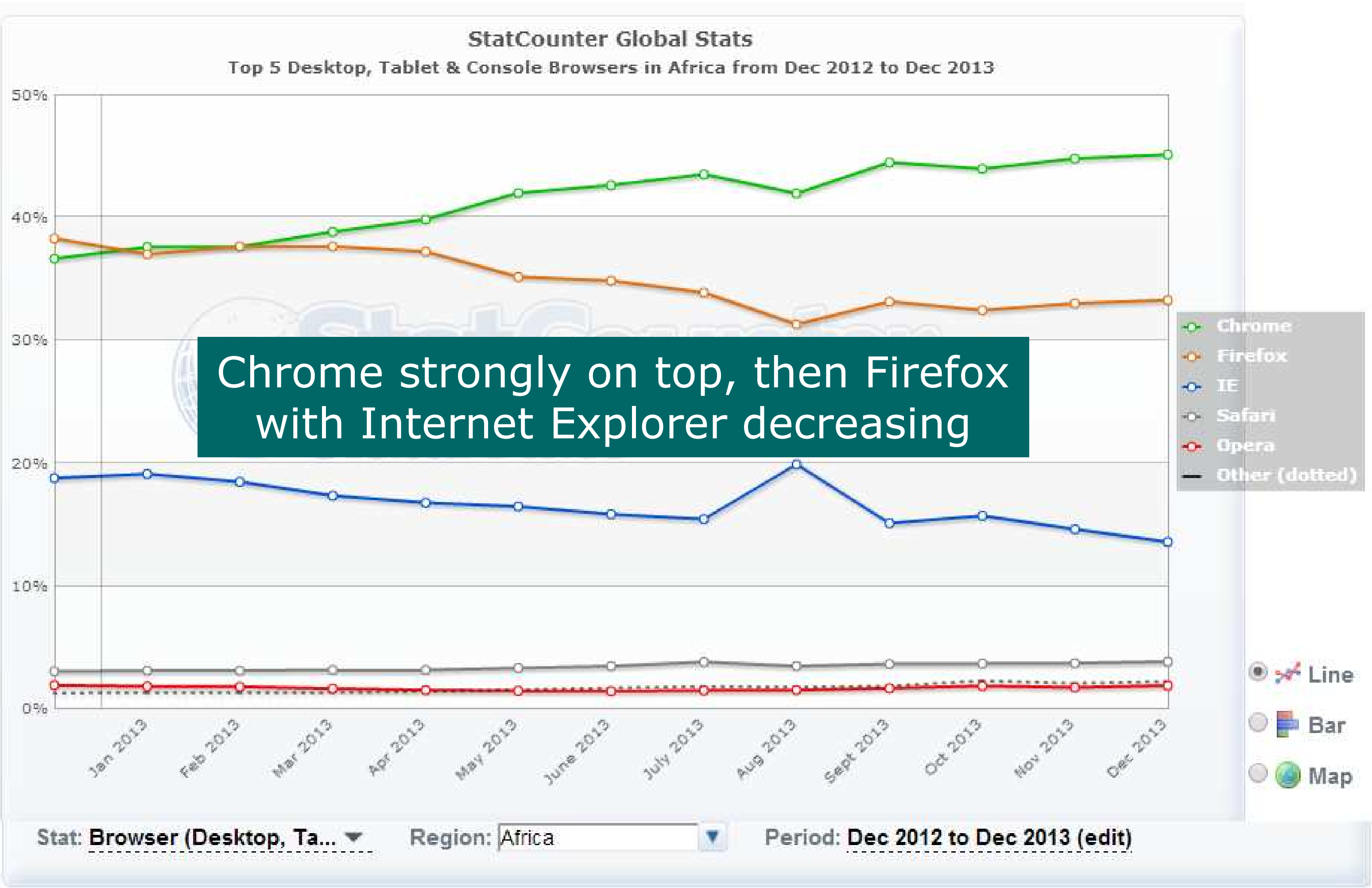
Region: North America

Period: Dec 2012 to Dec 2013 (edit)

Chrome is now on top with
Internet Explorer losing ground

Source: [http://gs.statcounter.com/](http://gs.statcounter.com/)

# Browser Use in **Africa**



Stat: Browser (Desktop, Ta...

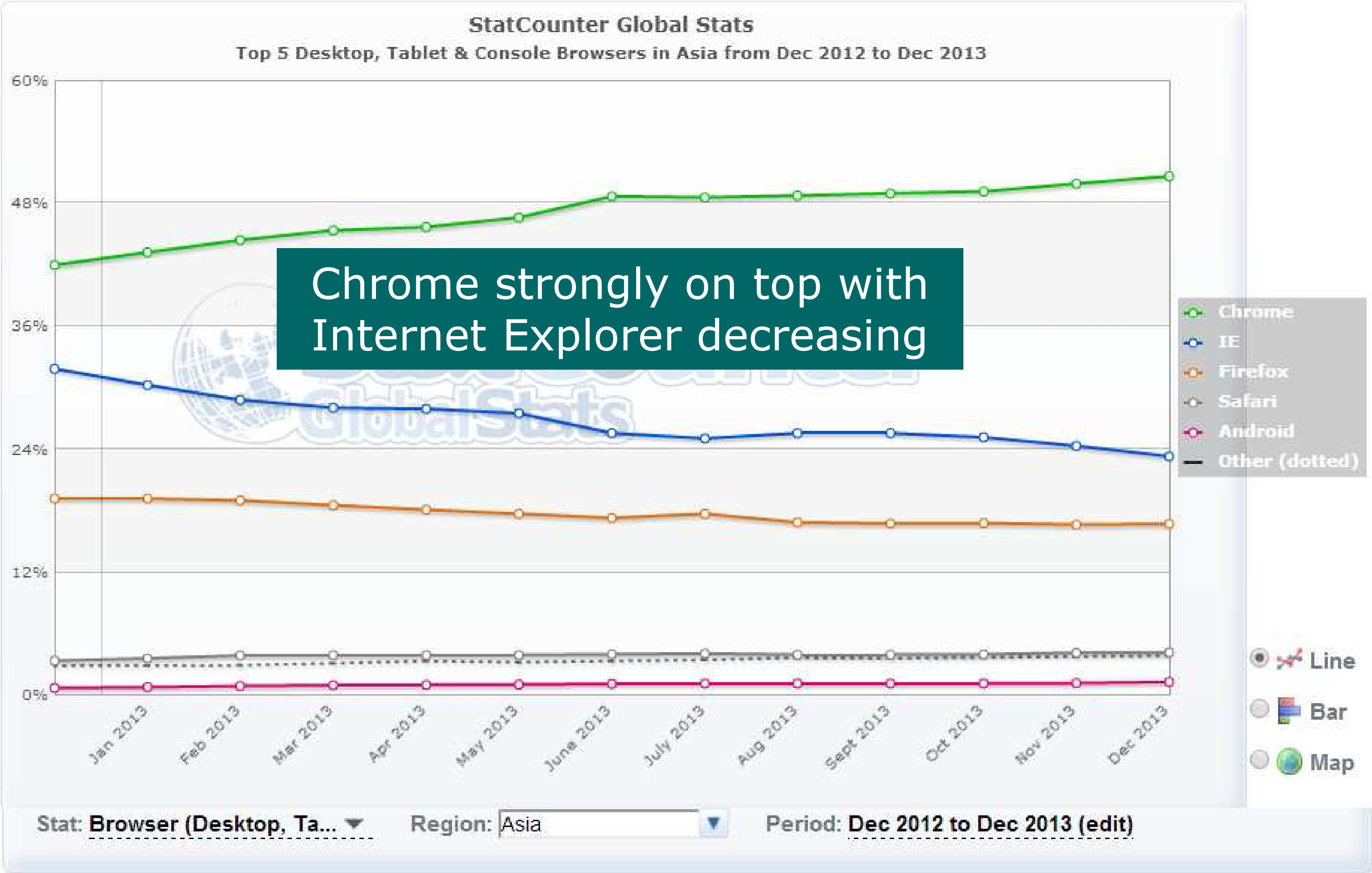
Region: Africa

Period: Dec 2012 to Dec 2013 (edit)

Chrome strongly on top, then Firefox with Internet Explorer decreasing

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

# Browser Use in **Asia**



StatCounter Global Stats

Top 5 Desktop, Tablet & Console Browsers in Asia from Dec 2012 to Dec 2013

Chrome strongly on top with Internet Explorer decreasing

Stat: Browser (Desktop, Ta... Region: Asia Period: Dec 2012 to Dec 2013 (edit)

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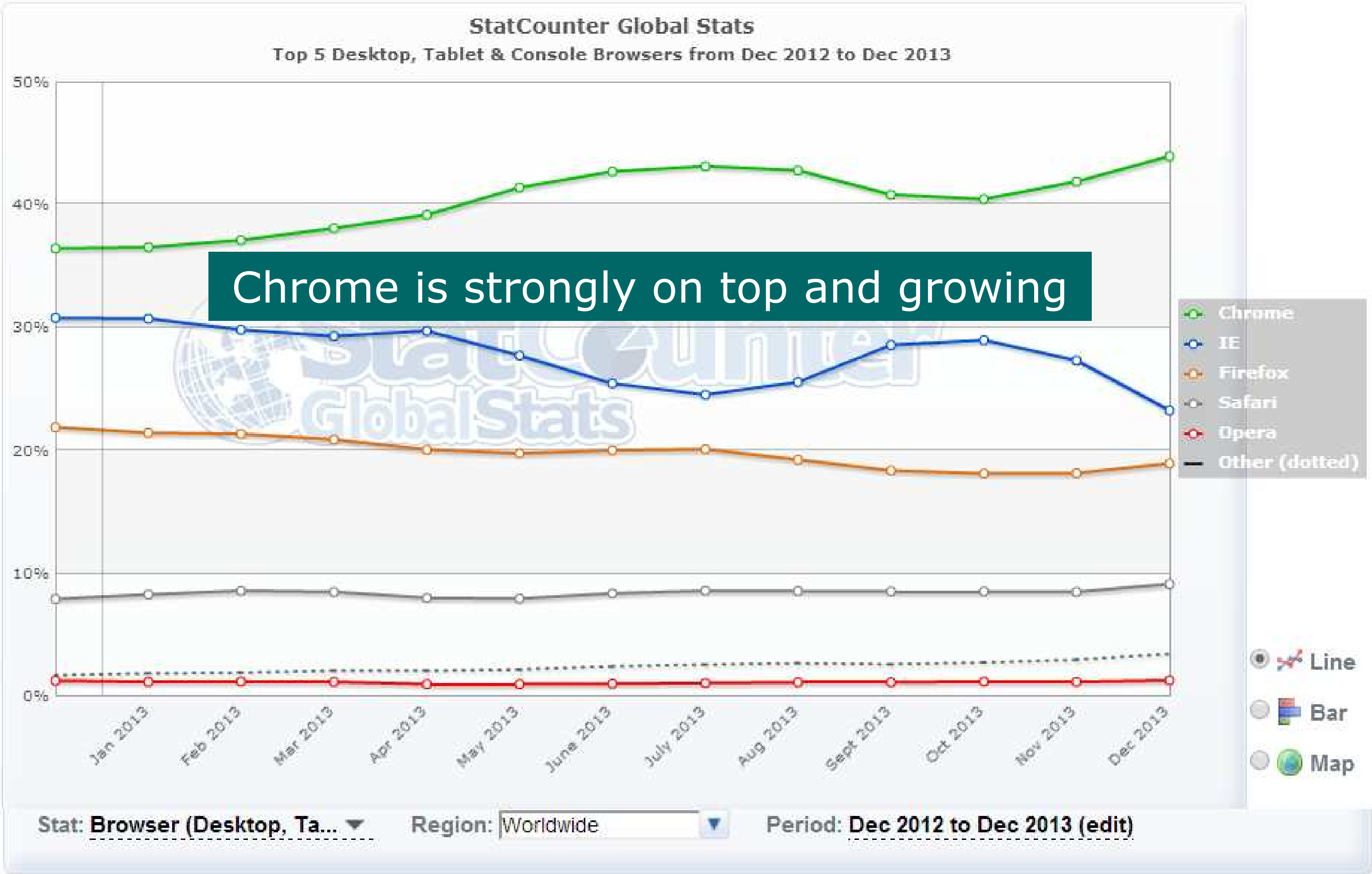
Source: http://gs.statcounter.com/

# Browser Use **Worldwide**



StatCounter Global Stats

Top 5 Desktop, Tablet & Console Browsers from Dec 2012 to Dec 2013

Chrome is strongly on top and growing

Stat: Browser (Desktop, Ta... Region: Worldwide Period: Dec 2012 to Dec 2013 (edit)

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

# **Advantages** of Moving Online to a Fully Hosted Web-based System

1. Overall system benefit and value to improve and streamline operations.
2. You only need a Web browser and Microsoft Office + Outlook installed locally.

WE ARE
MOVING!

3. The grants management service provider:
   - Maintains all of the server system hardware
   - Minor and major software fixes and upgrades
   - Ensures new and continuing links to local applications and online services
   - Backs up all of your grant data

# More **Advantages** of Moving Online to a Fully Hosted Web-based System

4. Service provider keeps enhancing the system based on the prioritized needs of their many clients.

5. Better integration with external systems and services.
6. Very easy remote access from anywhere.
7. *Somewhat* reduced need for in-house IT support*.*

# Moving from one system to another is like changing the tires on a moving car

www.che168.com

Car changing tires while moving – start at 1:46
http://www.youtube.com/watch?v=N_loMXs6l70

# Some **Key Things to Consider** When Moving Fully Online from Another System

1. No one-of-a-kind customizations, rather *personalized enhancements* to a core system for all of your foundation clients.
2. Inevitable differences (+&-) in functionality.
3. Data migration . . . many things may not carry over because of your variable codes, terminology, and data fields over time.
4. You need to provide enough staff, time and doing comprehensive system testing.

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# Some **Key Things to Consider** When Moving Fully Online from Another System

5. Your not recognizing the need to change operations to use the new system well.
6. Problems resulting from internal and external staff turnover during migration, training and ongoing support.
7. Vendor's choice of solid future technologies and partners.
8. Good management and a successful business model that *can and will evolve.*

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# **Questions** about Moving Online to a Fully Hosted Web-based System

1. Greater dependency on Internet access and the service provider(s) than ever before.
2. How many different service providers and products will you require to make and keep the whole system working?
3. Do they have a successful business model?
4. Does their staff really understand grantmaking operations, regulations and their system?

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# **Questions** about Moving Online to a Fully Hosted Web-based System

5. Who tests ALL of the products to ensure that they all keep working after upgrades?

test
code
development
requirements
defects
process
system
regression
quality
product
box
tests
offered
cases
results
data

6. Data conversion FROM your current systems and also TO a FUTURE successor system.
7. Make sure your demo is of the standard system – not a costly customized version.
8. What functionality do you currently have that WON’T be in the hosted system? OK?

# **Questions** about Moving Online to a Fully Hosted Web-based System

9. Personalized Web portals for each user type with graphics and interactive dashboards?
10. Their ongoing major investment in R&D with regular releases?
11. Is the user interface the same across all key systems?
12. What links does it currently have to internal and external services? *(e.g. GuideStar Charity Check, OFAC, NGOsource, accounting, EFT, social networking)*

NGOsource

# EDs Completed or In Progress in 51 countries

(as of 2/17/14)

Monday 3/17 3:30-5pm

NGOsource/TechSoup Global: Share the Work. Reap the Benefit. The Centralized ED Repository

- Austria
- Belgium
- Bulgaria
- Denmark
- France
- Germany
- Ireland
- Lithuania
- Netherlands
- Norway
- Poland
- Portugal
- Sweden
- Switzerland
- United Kingdom

- Belize
- Bolivia
- Brazil
- Canada
- Colombia
- Ecuador
- *Haiti*
- *Mexico*
- Panama
- Paraguay
- Peru
- Venezuela

- Australia
- Bangladesh
- China
- Hong Kong
- India
- Indonesia
- Japan
- Jordan
- Lebanon
- Palestine, State of
- Pakistan
- Philippines
- South Korea
- *Thailand*
- Turkey

- DRC
- Egypt
- Ghana
- Kenya
- Senegal
- South Africa
- Togo
- Tunisia
- Uganda

***Note: New Countries in Italics.***

techsoup GLOBAL

www.ngosource.org

# **Questions** about Moving Online to a Fully Hosted Web-based System

13. Easy personalization?
*(NOT costly customizations)*

14. Saving and naming favorite searches, views plus many standard reports?

15. Globalized multi-lingual
*(e.g. Nicolás, René)* and
multi-currency products?

16. Are the vendors using industry standard supported software and databases?

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# **Questions** about Moving Online to a Fully Hosted Web-based System

17. Systems hosted in secure reliable enterprise class datacenter?

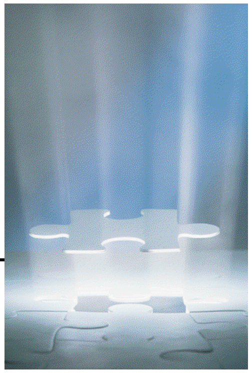
SAS70
COMPLETED TYPE II AUDIT

18. Is it designed and tested to handle a high volume and shared load of online applications and users?

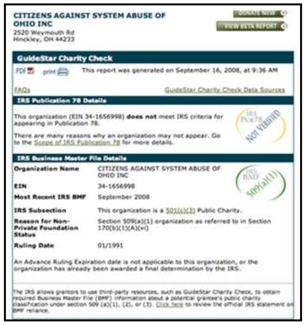
19. How good is their communications and project management?

20. What is their track record of providing quality support services?

# **Integration** with External Systems and Services



- Browsers and Microsoft Office
  *(major types 32 and 64-bit versions of each)*
- Windows 7 and 8 *(32 and 64-bit versions)*
- GuideStar for Charity Check and Simplify
- OFAC list checking services
- Accounting systems *(type and version of each)*
- Electronic board and committee books
- iPads and other Android tablets
- Foundation Center eGrant and hGrant Reporting + free mapping service
- NGOsource *(via new API)*
- Document management
- Electronic Fund Transfer (EFT & ACH)
- Social networking services



**CITIZENS AGAINST SYSTEM ABUSE OF OHIO INC**
2520 Weymouth Rd
Hinckley, OH 44233

**GuideStar Charity Check**

This report was generated on September 16, 2008, at 9:36 AM

**IRS Publication 78 Details**

This organization (EIN 34-1656998) **does not** meet IRS criteria for appearing in Publication 78.

There are many reasons why an organization may not appear. Go to the Scope of IRS Publication 78 for more details.

**IRS Business Master File Details**

| | |
|---|---|
| **Organization Name** | CITIZENS AGAINST SYSTEM ABUSE OF OHIO INC |
| **EIN** | 34-1656998 |
| **Most Recent IRS BMF** | September 2008 |
| **IRS Subsection** | This organization is a 501(c)(3) Public Charity. |
| **Reason for Non-Private Foundation Status** | Section 509(a)(1) organization as referred to in Section 170(b)(1)(A)(vi) |
| **Ruling Date** | 01/1991 |

An Advance Ruling Expiration date is not applicable to this organization, or the organization has already been awarded a final determination by the IRS.

The IRS allows grantors to use third-party resources, such as GuideStar Charity Check, to obtain required Business Master File (BMF) information about a potential grantee's public charity classification under section 509 (a)(1), (2), or (3). Click here to review the official IRS statement on BMF reliance.

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GuideStar Charity Check Data Sources
IRS Pub78 NOT VERIFIED
IRS BMF 509(a)(1)

simplify
Less process. More purpose.

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FOUNDATION CENTER
The Skillman
PHILANTHROPY IN/SIGHT™: SKILLMAN
ABOUT THIS MAP

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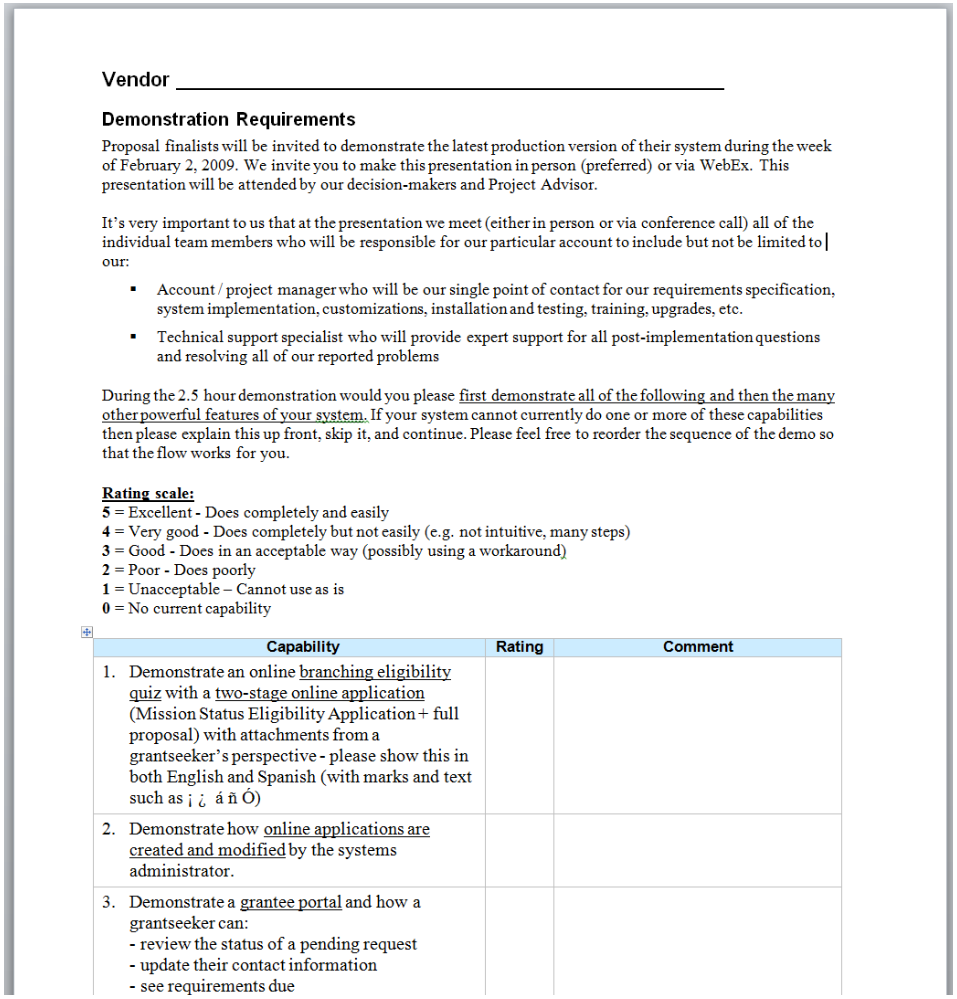
# What to **See, Track and Rate** in Vendor Demos

1. Prioritized features that you NEED and are MOST important to YOU
2. Count the number of steps to do routine operations (e.g. download online applications with attachments)
3. Creating and using saved searches, views and reports
4. How integration with 3rd party services REALLY works
5. Permit vendor's to demo their wonderful distinguishing features

# Create and Use a System
## Demo Rating Worksheet



Vendor ______________________________________________

### Demonstration Requirements

Proposal finalists will be invited to demonstrate the latest production version of their system during the week of February 2, 2009. We invite you to make this presentation in person (preferred) or via WebEx. This presentation will be attended by our decision-makers and Project Advisor.

It's very important to us that at the presentation we meet (either in person or via conference call) all of the individual team members who will be responsible for our particular account to include but not be limited to our:

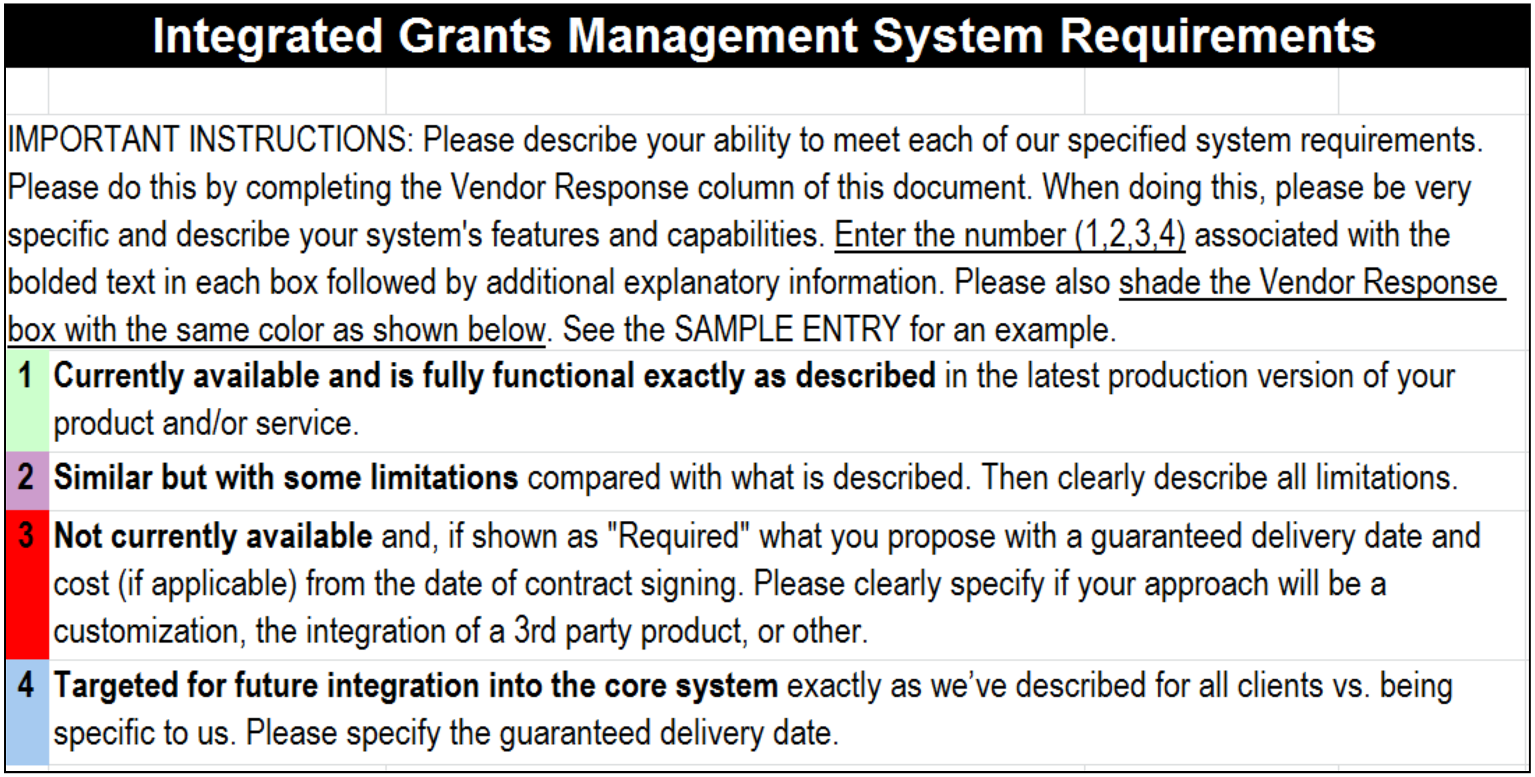
- Account / project manager who will be our single point of contact for our requirements specification, system implementation, customizations, installation and testing, training, upgrades, etc.
- Technical support specialist who will provide expert support for all post-implementation questions and resolving all of our reported problems

During the 2.5 hour demonstration would you please first demonstrate all of the following and then the many other powerful features of your system. If your system cannot currently do one or more of these capabilities then please explain this up front, skip it, and continue. Please feel free to reorder the sequence of the demo so that the flow works for you.

**Rating scale:**
**5** = Excellent - Does completely and easily
**4** = Very good - Does completely but not easily (e.g. not intuitive, many steps)
**3** = Good - Does in an acceptable way (possibly using a workaround)
**2** = Poor - Does poorly
**1** = Unacceptable – Cannot use as is
**0** = No current capability

| Capability | Rating | Comment |
|---|---|---|
| 1. Demonstrate an online branching eligibility quiz with a two-stage online application (Mission Status Eligibility Application + full proposal) with attachments from a grantseeker's perspective - please show this in both English and Spanish (with marks and text such as ¡ ¿ á ñ Ó) | | |
| 2. Demonstrate how online applications are created and modified by the systems administrator. | | |
| 3. Demonstrate a grantee portal and how a grantseeker can:<br>- review the status of a pending request<br>- update their contact information<br>- see requirements due | | |

# Ask the Service Provider to Use a **Clear Rating Scale**



**Integrated Grants Management System Requirements**

IMPORTANT INSTRUCTIONS: Please describe your ability to meet each of our specified system requirements. Please do this by completing the Vendor Response column of this document. When doing this, please be very specific and describe your system's features and capabilities. Enter the number (1,2,3,4) associated with the bolded text in each box followed by additional explanatory information. Please also shade the Vendor Response box with the same color as shown below. See the SAMPLE ENTRY for an example.

| | |
|---|---|
| **1** | **Currently available and is fully functional exactly as described** in the latest production version of your product and/or service. |
| **2** | **Similar but with some limitations** compared with what is described. Then clearly describe all limitations. |
| **3** | **Not currently available** and, if shown as "Required" what you propose with a guaranteed delivery date and cost (if applicable) from the date of contract signing. Please clearly specify if your approach will be a customization, the integration of a 3rd party product, or other. |
| **4** | **Targeted for future integration into the core system** exactly as we've described for all clients vs. being specific to us. Please specify the guaranteed delivery date. |

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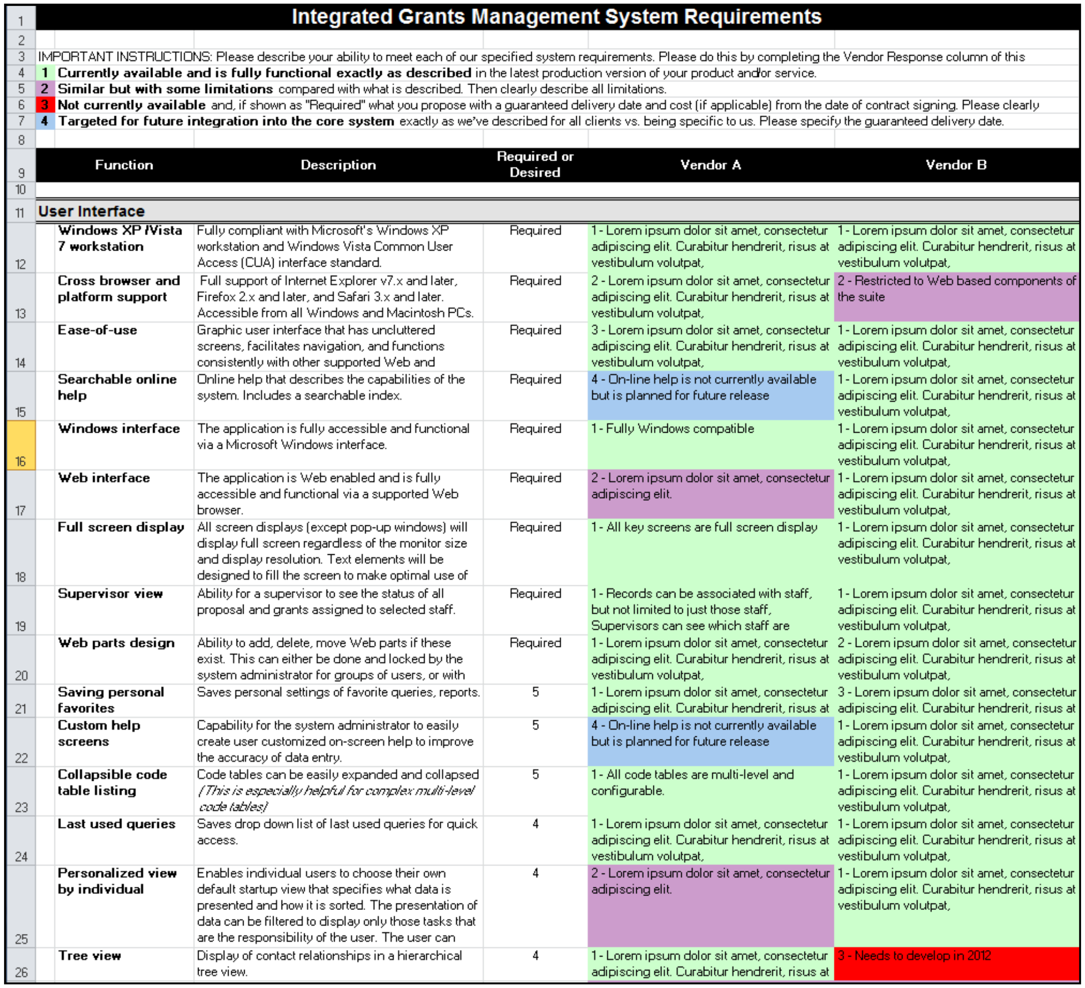
# Compare Vendor ***Described* System Capabilities** Side-by Side



**Integrated Grants Management System Requirements**

IMPORTANT INSTRUCTIONS: Please describe your ability to meet each of our specified system requirements. Please do this by completing the Vendor Response column of this

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

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

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

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

| Function | Description | Required or Desired | Vendor A | Vendor B |
|---|---|---|---|---|
| **User Interface** | | | | |
| **Windows XP /Vista 7 workstation** | Fully compliant with Microsoft's Windows XP workstation and Windows Vista Common User Access (CUA) interface standard. | Required | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Cross browser and platform support** | Full support of Internet Explorer v7.x and later, Firefox 2.x and later, and Safari 3.x and later. Accessible from all Windows and Macintosh PCs. | Required | 2 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, | 2 - Restricted to Web based components of the suite |
| **Ease-of-use** | Graphic user interface that has uncluttered screens, facilitates navigation, and functions consistently with other supported Web and | Required | 3 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Searchable online help** | Online help that describes the capabilities of the system. Includes a searchable index. | Required | 4 - On-line help is not currently available but is planned for future release | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Windows interface** | The application is fully accessible and functional via a Microsoft Windows interface. | Required | 1 - Fully Windows compatible | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Web interface** | The application is Web enabled and is fully accessible and functional via a supported Web browser. | Required | 2 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Full screen display** | All screen displays (except pop-up windows) will display full screen regardless of the monitor size and display resolution. Text elements will be designed to fill the screen to make optimal use of | Required | 1 - All key screens are full screen display | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Supervisor view** | Ability for a supervisor to see the status of all proposal and grants assigned to selected staff. | Required | 1 - Records can be associated with staff, but not limited to just those staff, Supervisors can see which staff are | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Web parts design** | Ability to add, delete, move Web parts if these exist. This can either be done and locked by the system administrator for groups of users, or with | Required | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, | 2 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Saving personal favorites** | Saves personal settings of favorite queries, reports. | 5 | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at | 3 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at |
| **Custom help screens** | Capability for the system administrator to easily create user customized on-screen help to improve the accuracy of data entry. | 5 | 4 - On-line help is not currently available but is planned for future release | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Collapsible code table listing** | Code tables can be easily expanded and collapsed *(This is especially helpful for complex multi-level code tables)* | 5 | 1 - All code tables are multi-level and configurable. | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Last used queries** | Saves drop down list of last used queries for quick access. | 4 | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Personalized view by individual** | Enables individual users to choose their own default startup view that specifies what data is presented and how it is sorted. The presentation of data can be filtered to display only those tasks that are the responsibility of the user. The user can | 4 | 2 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at vestibulum volutpat, |
| **Tree view** | Display of contact relationships in a hierarchical tree view. | 4 | 1 - Lorem ipsum dolor sit amet, consectetur adipiscing elit. Curabitur hendrerit, risus at | 3 - Needs to develop in 2012 |

# Tuesday 3/18 9:00 -10:00 am
## *Breakfast Roundtable*

## Selecting and Implementing Hosted Cloud-Based Information Systems

Learn
to Love
Breakfast

# Time for more spirited questions!

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

http://www.iaa.com