

What's New in Grants Management Software and Services

Technology Affinity Group Annual Conference
November 10, 2009

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Major Trends in 2008 - 2009

1. Some Purchases and Growing Companies
2. Expanded Use of Web-based Applications and Progress/Requirement Reporting
3. Enhanced Integration with Other Systems
 - Accounting Systems
 - Mapping and Charting
 - Microsoft SharePoint
 - Salesforce
 - GuideStar
4. More Hosted Web-based Systems

Major Commercial U.S. Grants Management Software and Service Providers



Major Vendor-Provided Information

- Table containing key vendor provided information as of September 30, 2009
- Screenshots of major new and enhanced features from 2008 and 2009 YTD
- Examples from multiple products and services

Grants Management Software and Service Providers – 2009

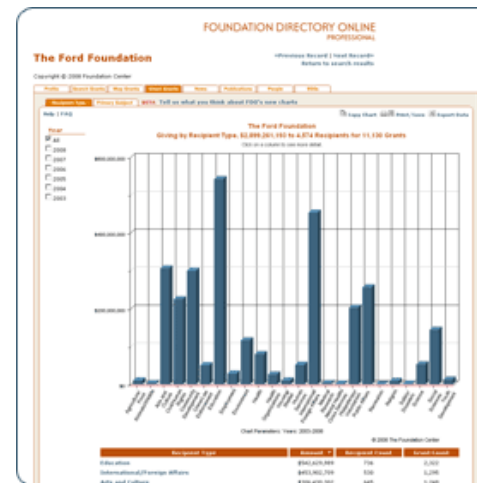
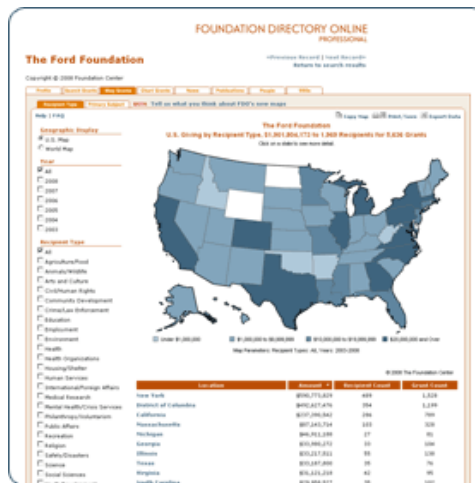
Vendor (Name of first grant software or service)	Active GM Clients as of 3/1/09	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2008-2009 (In multiple client production use as of 3/1/2009)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
Altum (1998) 877-GO-ALTUM 703-657-5299 www.altum.com info@altum.com 12100 Sunset Hills Rd Suite 101 Reston, VA 20190	16 Easy-grants clients 43 proposal-CENTRAL clients 24 Federal clients using PC, EG and other Altum grant related solutions 3 non-US clients (1 PC, 2 EG)	35 staff	Medium-to-large foundations Federal & State government agencies Biomedical grant-making organizations	<ul style="list-style-type: none"> Easygrants® <ul style="list-style-type: none"> Program Planning & Management Application Review (internal and/or external; individual & committee/panel) Grantee Financial and Progress Reporting Grants Management Contact Management Workflow Configuration Integrated Document Management (SharePoint) Queries & Reports proposalCENTRAL® <ul style="list-style-type: none"> Application Review Progress Reports Grants Management Contact Management Queries & Reports Altum Query Module ® Altum Financial Management and Costing Applications (based on Infor Performance Management) 	<ul style="list-style-type: none"> Easygrants <ul style="list-style-type: none"> Program management Outcomes logic framework Workflow & task builder PDF builder Screen label manager SharePoint integration (document management) High throughput performance enhancements Security management 508 accessibility compliance proposalCENTRAL <ul style="list-style-type: none"> New module: outcome/ impact tracking & program logic framework Extensive modifications to support online committee/panel meetings: multiple downloads, online discussion, group voting Enhance payment management (linked to progress reporting) & standardized interfaces to accounting systems Data collection & export file for reporting to Foundation Center and HRAGHRASP databases (grant award data sharing) Expanded configurable data fields in post-award. Ability to add awards that didn't go through the application/review process 	<ul style="list-style-type: none"> Microsoft Word Microsoft Excel Microsoft Outlook Microsoft SharePoint 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 an ASP service Proposal-CENTRAL is an ASP 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

Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2008-2009 (In multiple client production use as of 3/1/2009)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
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 – online review – Application Status 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 PRIs) • Pearl (custom)	<ul style="list-style-type: none"> eGrant.net <ul style="list-style-type: none"> advanced calculations improved validation checks Pearl <ul style="list-style-type: none"> Enhanced document management Enhanced unattended email correspondence Automatic document storage Enhanced GuideStar integration with automatic Charity Check recordkeeping Grants/gifts payable automation Integrated document scanning Streamlined fund accounting interface More powerful and flexible joint investment allocation, spendable allotment and fund fees assessment Workflow processing agent 	<ul style="list-style-type: none"> Microsoft Word Microsoft Excel Microsoft Outlook GuideStar MapQuest Google ChoicePoint Bridger Insight for compliance verification QuickBooks Citrix MetaFrame FIMS import from eGrant.net Peachtree 	Licensed software Optional hosted via Windows Terminal Server or Citrix Server Fundweb.net (donor statements and grant recommendations on the Web) eGrant.net online applications and reports	VB/VB .Net running on Windows 98/NT/2000/XP/VISTA Microsoft Access database versions 97/2000/XP/2003/2007 SQL Server Sybase

FOUNDATION DIRECTORY ONLINE

<http://fconline.foundationcenter.org/>

- 98,000 grantmaker Foundation Directory Online (FDO) and Philanthropy Insight profiles
- Over 3,600 company profiles
- Over 1.8 million grant descriptions
- 584,000+ grantmaker 990s for multiple years
- Interactive maps and charts
- Power Search: Search across nine Foundation Center databases at once



eGrant Reporting Standard Established in 1998

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 <i>only</i> 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

**Over 350
grantmakers
report
detailed
grant
information
electronically
today . . .**

this is now
growing quickly
with the
availability of
FREE maps
and charts

Grants Management Product and Service Providers Enable Built-in Foundation Center Export Reports



Carnegie Corporation of New York

«Previous Record | Next Record»
Return to search results

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Profile
Search Grants
Map Grants
Chart Grants
News
Publications
People
990s

Recipient Type
Primary Subject

Help | FAQ
Copy Map
Print/Save
Export Data

Carnegie Corporation of New York

U.S. Giving by Recipient Type, \$387,958,100 to 1,012 Recipients for 1,974 Grants

Click on a state to see more detail.

Geographic Display

U.S. Map

World Map

Year

All

2008

2007

2006

2005

2004

2003

Recipient Type

All

Agriculture/Food

Animals/Wildlife

Arts and Culture

Civil/Human Rights

Community Development

Crime/Law Enforcement

Education

Employment

Environment

Health

Health Organizations

Housing/Shelter

Human Services

International/Foreign Affairs

Mental Health/Crisis Services

Philanthropy/Voluntarism

Public Affairs

Map Parameters: Recipient Types: All, Years: 2003-2008

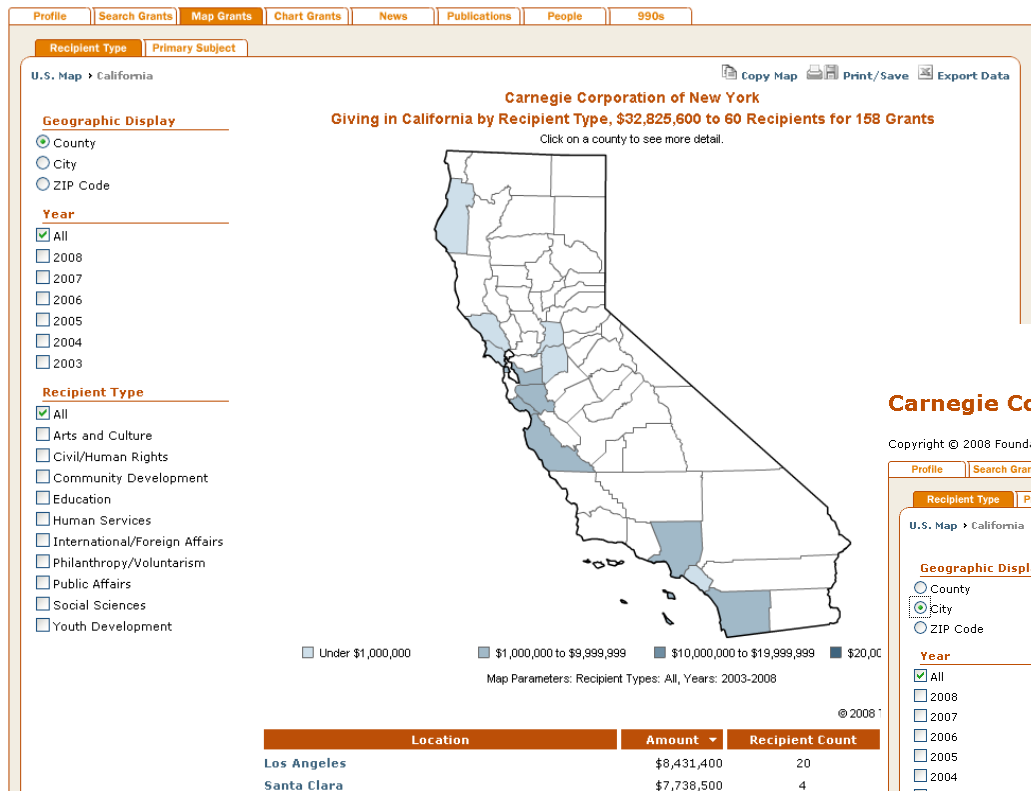
© 2008 The Foundation Center

Location	Amount	Recipient Count	Grant Count
District of Columbia	\$159,002,500	180	469
New York	\$93,677,600	542	855
California	\$32,825,600	60	158

Carnegie Corporation of New York

«Previous Record | Next Record»
Return to search results

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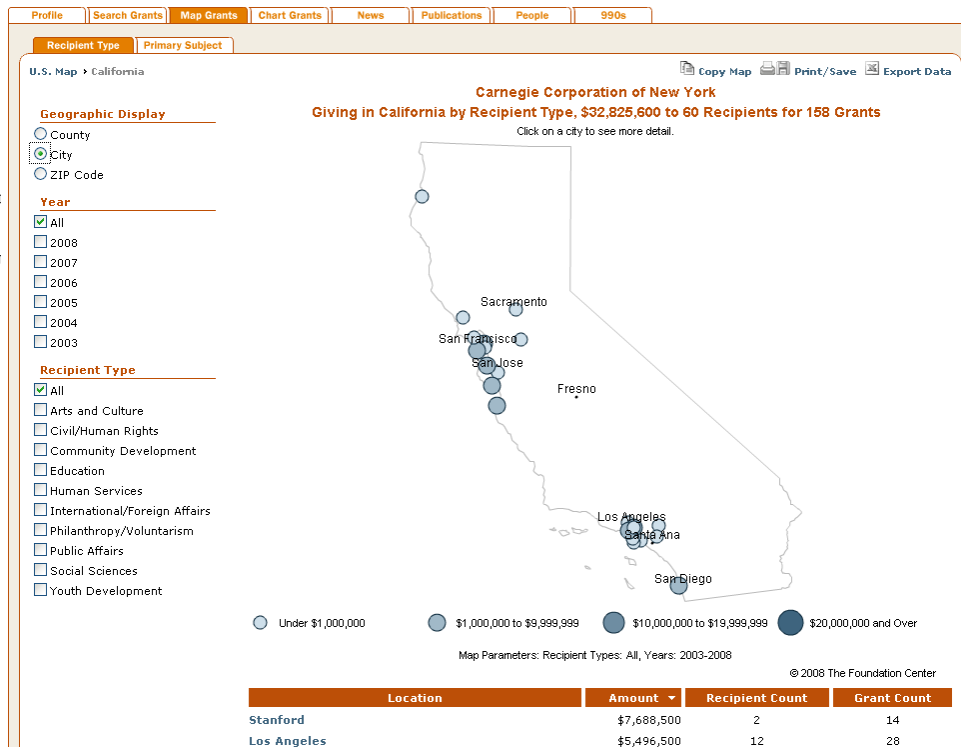
City display →

← County display

Carnegie Corporation of New York

«Previous Record | Next Record»
Return to search results

Copyright © 2008 Foundation Center



Recipient List

Recipient Count: 20

Parameters: **Recipient Types:** All, **Years:** 2003-2008, **State:** CA, **County:** Los Angeles

Click on any column header to re-sort the list.

Recipient Name	Location	Amount	Grant Count
RAND Corporation	CA	\$1,956,200	6
Center for Governmental Studies	CA	\$1,330,000	5
National Association of Latino Elected and Appointed Officials Ed			
Constitutional Rights Foundation			
California State University			
Strategic Concepts in Organizing and Policy Education			
University of California			
Mexican American Legal Defense and Educational Fund			
University of Southern California			
National Korean American Service and Education Consortium			
Asian Pacific American Legal Center of Southern California			

Grant Details

Recipient	Mexican American Legal Defense and Educational Fund
Location	Los Angeles, CA
Zip Code	90014-3921
Recipient URL	http://www.maldef.org
Type of Recipient	Civil/human rights, minorities; Legal services, public interest law
Grantmaker	Carnegie Corporation of New York, NY
Grantmaker Geographic Focus	National; international
Grant Amount	\$250,000
Year Authorized	2007
Duration	2-year grant
Description	Toward immigrant rights advocacy program
Type(s) of Support	Program development
Subject(s)	Civil/human rights, immigrants; Civil/human rights, minorities; Hispanics/Latinos; Immigrants/refugees; Legal services, public interest law; Public affairs, citizen participation
Additional Location Information	County: Los Angeles; Metropolitan area: Los Angeles-Long Beach-Santa Ana, CA
Recipient EIN	741563270
Recipient 990	2007 2006 2005 2004 2003 2002

Asia

Zoom To

Grantmaker Map

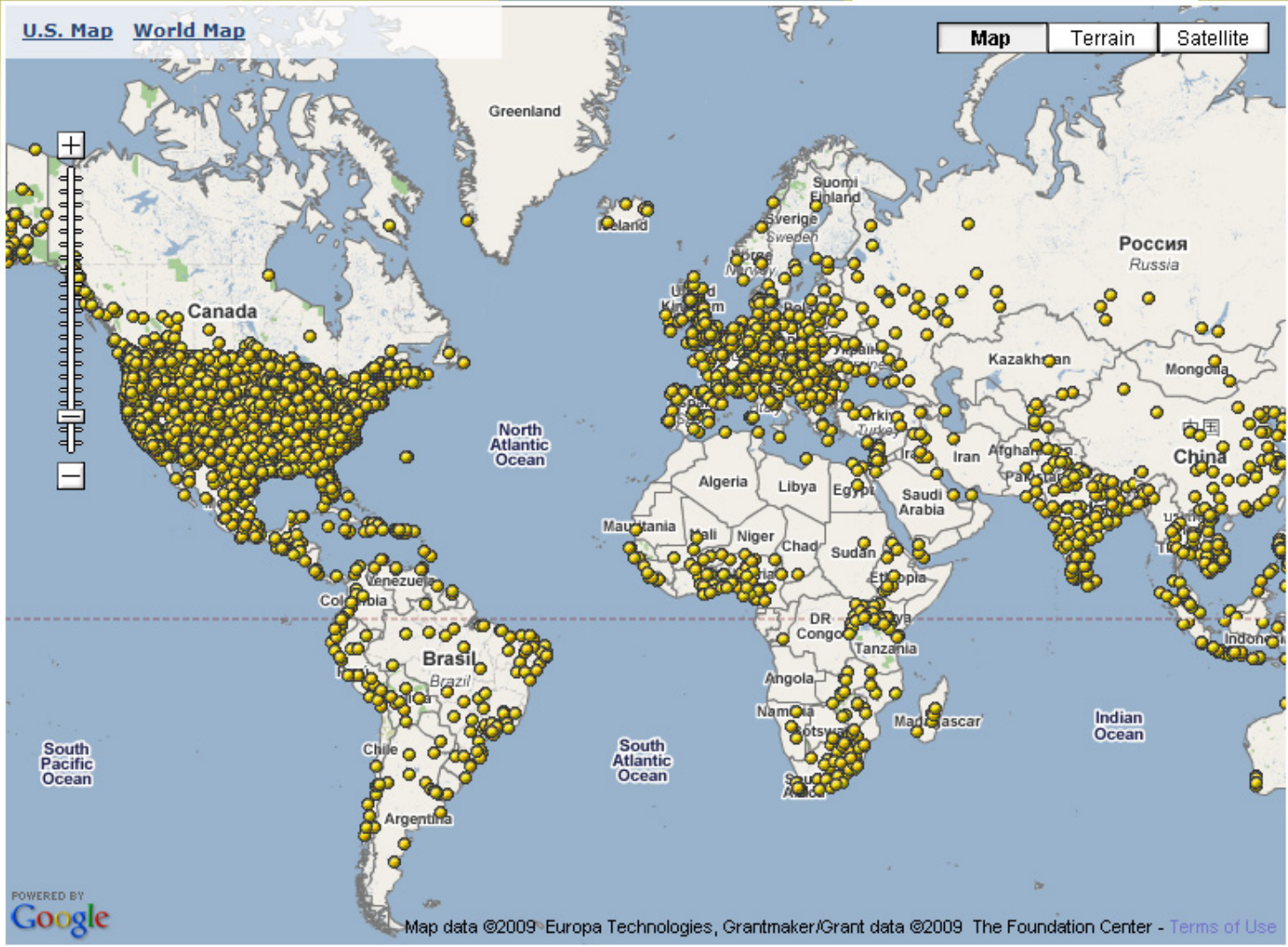
Edit

Grant Map

Edit

[U.S. Map](#) [World Map](#)

Map Terrain Satellite



About this Map

- 20,093 Grantmakers
- 149,349 Recipients
- 1,494,990 Grants

Table

Current Filters

Geographic Display: Country
Grant Indicator: None
Demographic Indicator: None
Grant Years: 2003-2008

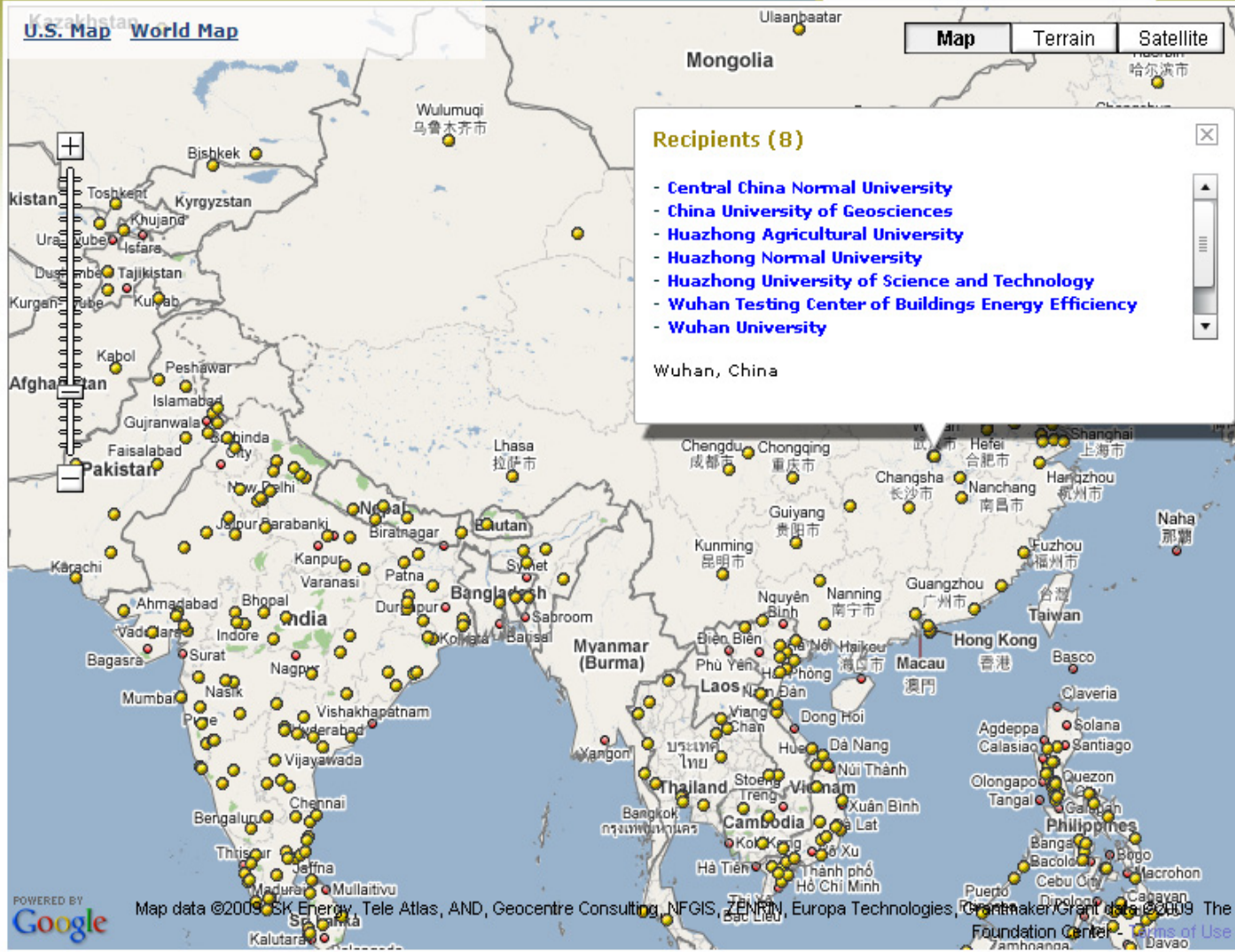
[Print/Save Map](#)

[Copy Map](#)

Asia

Grantmaker Map 

Grant Map 



About this Map

● 20,093 Grantmakers
● 149,349 Recipients
1,494,990 Grants



Current Filters

Geographic Display: Country
Grant Indicator: None
Demographic Indicator: None
Grant Years: 2003-2008

[Print/Save Map](#)

[Copy Map](#)

Energy Foundation

Contact Information

301 Battery St., 5th Fl.
San Francisco, CA 94111
Telephone: (415) 561-6700
Contact: Eric Heitz, Pres.
Fax: (415) 561-6709
E-mail: energyfund@ef.org
URL: www.ef.org

Financial Data

Year Ended: 12/31/2006
Assets: \$47,505,018
Gifts Received: \$51,421,935
Expenditures: \$27,615,525
Total Giving: \$19,992,211
Grants Amount: \$19,992,211

Type of Grantmaker

Independent foundation

Established

1991

EIN

943126848

990-PF

[2007](#), [2006](#), [2006](#), [2005](#), [2004](#), [2003](#), [2002](#), [2001](#)

Purpose and Activities

To assist in a transition to a sustainable energy future by promoting energy efficiency and renewable energy.

Fields of Interest

Subjects: Environment, energy. **International Interests:** China.

Recipient List(370)

Name ▲	City	State	Grant Count
20/20 Vision Education Fund	Silver Spring	MD	1
Alliance for Affordable Energy	New Orleans	LA	3
Alliance for Clean Energy New York	Albany	NY	1
Alliance for Sustainability	Minneapolis	MN	1
Alliance to Save Energy	Washington	DC	16
American Coalition for Ethanol	Sioux Falls	SD	1
American Corn Growers Foundation	Washington	DC	3
American Council for an Energy-Efficient Economy	Washington	DC	50
American Fund for Charities	Washington	DC	1



EasyGrants®
proposalCENTRAL®
Altum Query Module®
Altum Financial Management and
Costing Applications

Easygrants provides the framework to define outcome indicators for each grant program and collect expected/actual outcomes from NFWF applicants/grantees.

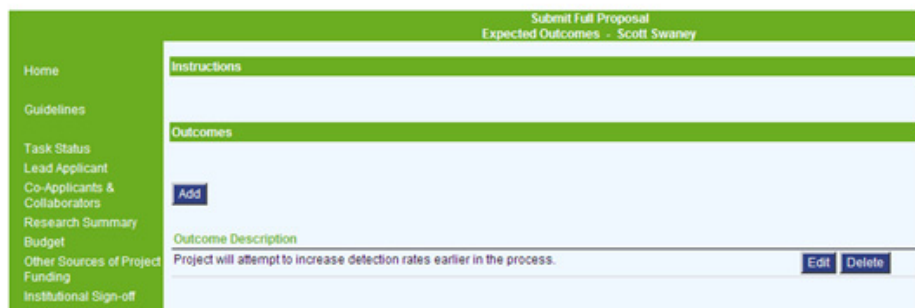


Figure 1: Screen shot from Altum Easygrants showing the outcome section of a grant application.

Outcome Indicator(s) and Units of Measure

Indicator and Units of Measure * Baseline * Value at Grant Completion * Long-term Value * In What Year will Long-term Value to be Achieved? *

Add <Select> Add

If "Other" is selected above, enter indicator and units.

Indicator and Units of Measure	Baseline	Value at Grant Completion	Long-term Value	Year long-term value to be achieved	
Early Detection	30%	50%	75%	2010	Edit Delete
Reduced Morbidity	75%	20%	5%	2020	Edit Delete

Each proposed outcome is linked to specific indicators for the grant program.

Figure 2: Each proposed outcome is connected to one or more specific indicators (available in the select list) associated with the particular grant program along with data elements to assess progress (baseline value, expected value).

Easygrants is integrated with MS Sharepoint for document management. Documents are collected through workflow tasks or added directly to the grant file.

The screenshot shows the 'Easygrants Manager' interface. The 'Documents' tab is selected, displaying a 'Summary' section with fields for Grant ID, Grantee Organization, Status, Funding Opportunity, Created On, Modified On, Legacy Grant ID, Primary Contact/PI, Program, Funding Cycle, and Modified By. Below this is a 'Submitted Documents' table with columns for Description, Submitted Date, Submitted By, File Name, and Options.

Description	Submitted Date	Submitted By	File Name	Options
	7/21/2006	Smith, John	Doc1.doc	View
	7/21/2006	Smith, John	Doc1.doc	View
	7/21/2006	Smith, John	Expenses_Budget.doc	View
	10/19/2007	Mckee, James	Letter of inquiry.doc	View
	10/19/2007	Mckee, James	James_p_mckee_bio_ALTUM_09242007.DOC	View
	11/19/2007	Mckee, James	Budget and Justification Temp 03112005.doc	View
	11/19/2007	Mckee, James	James_p_mckee_bio_ALTUM_09242007.DOC	View
	11/19/2007	Mckee, James	Proposal for Cross Industry P Evaluation 09132007.doc	View

All grant documents are stored and accessible in the Grant File under "Documents."

Rather than storing these documents in the database or file system, Easygrants stores them in Sharepoint.

The screenshot shows a SharePoint 'Shared Documents' library. The breadcrumb path is: 'Alum, Inc. > Sites > GSM Sales & Marketing > Shared Documents > Easygrants_Demo_6.0 > Grants > 2_Efficacy and Evaluation Mechanism > 39_Easygrants ID'. The library contains two documents: '198_Letter of Award - Short' (Type: Document, Modified: 10/8/2009 11:42 AM, Modified By: Alum 1) and another instance of the same document.

As a document management system, Sharepoint provides version tracking and full text searching of grant documents.

The image consists of three overlapping screenshots of a SharePoint web interface, illustrating document management for grant programs. The top screenshot shows a 'Shared Documents' library with two folders: '1_Health Technology Assessment' and '2_Efficacy and Evaluation Mechanism'. A callout box points to these folders, stating 'Easygrants creates folders for each grant program.' The middle screenshot shows a sub-library for '2_Efficacy and Evaluation Mechanism' containing two versions of a document named '198_Letter of Award - Short'. A callout box points to the document list, stating 'And stores all grant documents in a folder for that grant.' The bottom screenshot shows the 'Version History' for the '198_Letter of Award - Short.docx' document, displaying a table of three versions. A callout box points to the version history table, stating 'And track the version history of each document.'

Documents are indexed for full text searching.

Easygrants creates folders for each grant program.

And stores all grant documents in a folder for that grant.

And track the version history of each document.

No.	Modified	Modified By	Size	Comments
3.0	10/11/2009 7:10 PM	Jamie McKee	34.4 KB	add mods #2
2.0	10/11/2009 7:07 PM	Jamie McKee	34.2 KB	made modifications
1.0	10/11/2009 1:11 AM	Altum 1	35.2 KB	

Documents can be created and edited through process controls (Easygrants' tasks) or through the collaboration facilities of Sharepoint.

Documents can be created and edited through a defined process – Easygrants workflow tasks like “Create Letter of Award.”

The screenshot shows a web form titled "Create Letter of Award" with a sub-header "Create Letter of Award - Altum Admin". A left-hand navigation menu includes links for Home, Guidelines, Project Coding, Project Contact, Project Milestones, Attach Supporting Documents, Create Letter of Award (highlighted), FAQ, Help, and Log Out. The main content area is divided into sections: "Instructions", "Grant Information" (with fields for Easygrants ID, Primary Contact/PI, Award Amount, Primary Staff Contact, and Project Title), "Summary Documents" (showing "No Summary Documents for this Grant"), "Create Agreement" (with a dropdown for "Select Agreement Type" and a "Go" button), and "Upload Details" (a table listing uploaded documents).

File/Document Name	Uploaded By	Uploaded Date
Letter of Award - Short.docx	McKee, David	10/8/2009

... or shared and edited collaboratively in Sharepoints project sites.

The screenshot shows a SharePoint "My Site" profile page for Jamie McKee. The page includes a profile picture, a "My Profile" sidebar with links for Details, Links, Colleagues, and Memberships, and a main content area with sections for "SharePoint Sites", "Documents", "Tasks", "RSS Viewer", and "Tactical Philanthropy". The "Documents" section lists two files: "James P McKee Altum Resume" and "James in track attire". The "RSS Viewer" section displays several news items related to philanthropy and social entrepreneurship.

Every organization has its own work processes and terminology – Easygrants provides for personalization of the grants management system beyond logos and style sheets.

Easygrants Workflow Builder

Easygrants workflow builder enables selection of the tasks, their names and their flow, personalized to each program.

Task	Start Date	Open Date	Due Date	Close Date	End Date
Submit Outline Proposal	01/01/2009	01/01/2009	12/31/2009	12/31/2009	12/31/2009
Review Outline Proposal	01/01/2009	01/01/2009	12/31/2009	12/31/2009	12/31/2009
Submit Full Application	01/01/2009	01/01/2009	04/01/2009	08/01/2009	08/01/2009
Submit Letter of Support	01/01/2009	01/01/2009	05/01/2009	05/01/2009	05/01/2009
Review Application	01/01/2009	01/01/2009	12/31/2009	12/31/2009	12/31/2009
Submit Co-Applicant Documents and Approval	01/01/2009	01/01/2009	12/31/2020	12/31/2020	12/31/2020
Submit Department Head Documents and Approval	01/01/2009	01/01/2009	12/31/2020	12/31/2020	12/31/2020
Submit Institution Documents and Approval	01/01/2009	01/01/2009	12/31/2020	12/31/2020	12/31/2020

Easygrants Task Builder

Task builder enables the administrator to define the screens that comprise each task. (Screens, forms, upload templates are stored in a forms library for selection in any task).

Order	Navigation Name	Form	Form Description	Validation	Edit	Delete
0	Task Status	Sys - Main with Project Information	Main Page			
1	Lead Applicant	Sys - Proposal Contact Information	Proposal Contact Information	Validation	Edit	Delete
2	Co-Applicants & Collaborators	Sys - LOI Personnel	LOI Personnel	Validation	Edit	Delete
3	Research Summary	Sys - Proposal Project Information	Proposal Project Information	Validation	Edit	Delete
4	Budget	Sys - Proposal Budget	Budget	Validation	Edit	Delete
5	Other Sources of Project Funding	Sys - Matching Contributions	Matching Contributions	Validation	Edit	Delete
5	Institutional Sign-off	Demo - Co-Applicants & Officials	Demo - Co-Applicants & Officials	Validation	Edit	Delete
6	Applicant(s) Current & Pending Support	Sys - Progress Report Other Support	Progress Report Other Support	Validation	Edit	Delete

Easygrants Label Manager


The Label Manager enables standard Easygrants screen labels to be modified globally to reflect an organization's own terminology for its grant programs.






Default Label Name	Preferred Label Name	Options
Allocation Status	Allocation Status	Edit
Fund Balance	Fund Source Balance	Edit
Fund Description	Fund Source Description	Edit
Fund End Date	Fund End Date	Edit
Funding Cycle	Grant Scheme Name	Edit
Funding Opportunity	Grant Scheme	Edit
Funding Opportunity Display Name	Grant Scheme Name	Edit
Fund Name	Fund Source Name	Edit
Fund Number	Fund Source Account Number	Edit
Status	Status	Edit
Fund Type	Fund Source Type	Edit



First Pearl
Corporate Pearl
Community Pearl
eGrant.net
Pearl Companions
Pearl Loan Servicing
Pearl Custom










4 Square Quartet [Me]


Review Criteria: Enter scores in the box to the right of each criteria. Hover over the  to view a detailed description of the criteria.

Criteria	Score	Comments
Need (0 - 10)	 9	I think this is an outstanding example of a joint private-public sector initiative that leverages the relative expertise of both organizations. Contrary to the other comments, I do not think that this effort is duplicative nor does it undermine the efforts of other projects already funded by us in the past year.
Feasibility (0 - 10)	 8	
Feasibility (0 - 10)	 8	
Quality (0 - 10)	 9	
Extent of impact (0 - 10)	 7	
Weighted Score (0 - 50)	41.00	
Percentile	0%	Recommended Amount: <input type="text" value="2000.00"/>

Save **Cancel**

Application Attachments Other Comments






1 / 2


92.9%





2009-2010 Grant Application

Application ID:

Review Cover

Add New Review Group
Show Review Groups

Review Group: Project Support Group Review By: 12/31/2009
 Settings Reviewers Criteria Applications

Filter: Available Tables: --Include All-- Available Fields: --Include All-- Field Value: --Include Any Value-- Fiscal Year: 2009 Apply Application Filter

Clear Selection Select All Invert Selection Add to Group

App ID	This query has returned 30 Applications
76055	<input type="checkbox"/> 125100 [125100]: Sunspot Grants - Full Application : 2009
49134	<input type="checkbox"/> 4 Square Quartet [Me]: Sunspot Grants - Full Application : 2009
77963	<input type="checkbox"/> ABC for your Community [Jo Ann Healy]: Sunspot Grants - Full Application : 2009
61623	<input type="checkbox"/> abcd [abcd]: Sunspot Grants - Full Application : 2009
77093	<input type="checkbox"/> Bagpipng school [mark]: Sunspot Grants - Full Application : 2009
49059	<input type="checkbox"/> Ball [Donna]: Sunspot Grants - Full Application : 2009
49485	<input type="checkbox"/> Battle Creek Community Foundation [Joann Farnham]: Sunspot Grants - Full Application : 2009
49033	<input type="checkbox"/> BBF [Donna]: Sunspot Grants - Full Application : 2009
48852	<input type="checkbox"/> Bromelkamp [Alex Plonski]: Sunspot Grants - Full Application : 2009
52356	<input type="checkbox"/> Bromelkamp Company [Matt]: Sunspot Grants - Full Application : 2009
52835	<input type="checkbox"/> Bromelkamp Company [Michael Matuszak]: Sunspot Grants - Full Application : 2009
76757	<input type="checkbox"/> Chindaly Griffith [Chindaly Griffith]: Sunspot Grants - Full Application : 2009
48829	<input type="checkbox"/> Community Foundation of Greater Birmingham [James McCrary]: Sunspot Grants - Full Application : 2009
58450	<input type="checkbox"/> Dan Varley [Dan Varley]: Sunspot Grants - Full Application : 2009

This Review Group has 4 applications to review.

App ID	Title	Weighted Score
49134	Remove 4 Square Quartet [Me]	0.00
52356	Remove Bromelkamp Company [Matt]	13.00
50396	Remove Pathways for Children [Melinda Jennis]	37.00
50568	Remove Testing [Tester 1]	17.50

Review Detail

The administrator sets up a group, assigns reviewers to the group, sets up the criteria by which the application is reviewed, then assigns the applications to the review group.

Application Tracking

Applicant: Cheerful Givers
Grant Type: Bromelkamp Foundation Application
Fiscal Year: 2009

Contact Person: Susan Sother
ApplicationNumber: 3343
Title: Holiday Giving Campaign
Decision Date: 11/23/2010
Grant Amount: \$2,000
Requested Amount: \$2,000



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This product or portions thereof is manufactured under license from Carnegie Mellon University.

Application Tracking

Contacts Tracking : Form

Num: 5016 DoNotMail: Updated: 9/9/2009 sallen

Contact: Maye^Patrice ConTitle: Development Director
ConTel: 617-268-7620 Sal: Patrice Email: patricemaye@afhboston.com

Name: Artists For Humanity Ser: 673 Updated: 11/2/2007 mmoore
Legal: Artists For Humanity, Inc. (AFH) Founded: 1992 Inst: 3
Addr1: 100 West Second Street TaxID: 04-3138434 FYEnd: 2/31/2009
Addr2: CEO: Rodgerson^Susan
City: Boston State: MA ZIP: 02127 CEOTitle: Exec./Artistic Director
Tel: 617-268-7620 Fax: 617-268-7358 County: Suffolk CEOEmail: srodgerson@afhboston.com
WWW: www.afhboston.com

ServiceArea: multiple states NameEmail: AFH@ziplink.net eTel:

ServiceAreaDe


Mission: Fou em

Content: Note:

All Contacts fo

Num	Name	Title	Phone	Email
5016	Maye^Patrice	Development Director	617-268-7620	patricemaye@afhboston.com

Pearl Link to GuideStar.org

 No CharityCheck report on file.
Do you want to save a PDF copy of the CharityCheck report in
Constituent Chronicle?

Yes No

Pearl Link to GuideStar Charity Check

Bromelkamp Future Developments for 4Q 2009 and 2010

- Akoya - our Web-based grants management for small foundations.
- Improvements to the accounting systems providing ease of use and data entry safeguards for our clients.
- Expanding our existing workflow processing and continuing to make strides towards a paperless office are also on our agenda for early 2010.



Dotche™

OLGA

Online Donor Services
Content Management System
(CMS)

Philanthropic Back Office (PBO)
Charitable Advisor Platform (CAP)



Grant Recommendation Worksheet

This is the grant recommendation worksheet.
You may use the "Find" button to select a non- database or you may enter the information in the fields below.

Donor may select suggested grantee from his recommendation history

Donor may populate worksheet from his last recommendation

Submit Recommendation Worksheet

[Click here to pre-populate your worksheet with your last recommendation history.](#) [Reset Worksheet](#)

Organization Name	Amount	Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>
Show Details		

Donor may find a grantee in the charitable catalog

Organization Name	Amount	Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>
Show Details		

Spotlighted funding opportunity matches donors charitable interests

Organization Name	Amount	Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>
Show Details		

Organization Name	Amount	Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>
Show Details		

Organization Name	Amount	Purpose
<input type="text"/>	<input type="text"/>	<input type="text"/>
Show Details		

Recommendation History

You have made recommendations to these organizations in the past.

- Saint John's Communities, Inc.
- Boys & Girls Clubs of Greater Milwaukee
- Boys & Girls Clubs of Greater Milwaukee
- AIDS Network

[Add Checked](#)

SOCIAL ISOLATION LEAVES ELDERLY AT RISK FOR HEART TROUBLE



Loneliness, lack of emotional support and lack of companionship or social support can leave elderly men and women

Contact Info
Interest Profile
Resources

Organization Profile

- [Organization](#)
- [Staff Management](#)
- [Organization Story](#)
- [Interest Areas](#)
- [Budget](#)
- [Goals](#)
- [Board Members](#)
- [Tax Information](#)
- [Documentation](#)
- [Certifications](#)



Documentation

Please provide, or update the documentation that we have on file for your organization.

Document	Received	Approved	Expires	Status	Update File(s)
990	09/25/2009	09/25/2009	09/24/2010	approved	Upload Your File: <input type="text"/> <input type="button" value="Browse..."/>
<p>Due Diligence System: Solicit and store electronic copies of 990 and IRS letters. Automatic workflow notification of updates to staff, expiration reminders to fund seeker.</p>					
IRS Letter	09/25/2009		09/24/2010	pending	Upload Your File: <input type="text"/> <input type="button" value="Browse..."/>

Or, update this file using the following alternate method:

Fax

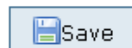
 Mail

 Not required for our organization

 Use the following URL:

Due Diligence Documents							
<i>(Foundation Control Panel)</i>							
Name	Status	File Type	Creation Date	Queue Date	Approval Date	Expiration Date	ID
990_Oakwood_Community_Foundation_2008.doc	approved	990	Sep 25, 2009		Sep 25, 2009	2010-09-24	<input type="button" value="Delete"/>
IRS_Status_Oakwood_Community_Foundation.doc	pending	IRS Letter	Sep 25, 2009			2010-09-24	<input type="button" value="Delete"/>

Programs



Resources


Brought to you by:

Due Diligence

Multiple review stages in LOI or proposal phase with custom review forms for individual or committee

- Apply for Grants**
- Charitable Catalog**
- MyAccount**
- Contact Info**

Welcome William Henderson..
Current Proposals for Your Review:

 To sort by multiple columns, hold the shift key and select each column you wish to sort.

Show unreviewed only

Worksheet	Application	Proposal	Org	Status	Reviewed On
Default Worksheet	2007 Neighborhood Technology Grant Program	Technology and Information Literacy Initiative (TILI) Learning Centers	Cuyahoga Community College Foundation	Submitted	09/10/2009
Default Worksheet	2007 Neighborhood Technology Grant Program	Project Connect	Scranton Road Ministries CommunityDevelopment Corporation	Submitted	09/28/2009
Default Worksheet	2007 Neighborhood Technology Grant Program	Community Computer Access Program	Fatima Family Center	Submitted	Review Now >>
Default Worksheet	2007 Neighborhood Technology Grant Program	Senior Computer Community Center	Ashbury Community Services, Inc.	Submitted	Review Now >>
Default Worksheet	2007 Neighborhood Technology Grant Program	Technical & Instructional Support for the Neighborhood Computer Center	Thea Bowman Center	Submitted	Review Now >>

Worksheet Application Proposal Org Status Reviewed On

Page: 1/4

Online Grant Review Screen 1

Proposal dashboard helps the reviewer to manage assigned reviews

William Gruber's "Default Worksheet" Worksheet


[Back to Review Proposals](#)

Links to organization profile and budget

Application: 2007 Neighborhood Technology Grant Program

Reviewer Responses:
Default Worksheet (1) ▲
[Kevin McDaniel - 09/28/2009](#)

Proposal: Community Computer Access Program

 Fatima Family Center
[View Budget](#)

Complete proposal with all questions and responses

Reviewers can optionally see prior reviews

Questions

Project start date:
1-1-08
Project end date:

directory for the saved file - double click on the identified document's name.

LOI responses included in full proposal review

LOI







Project Name
Community Computer Access Program
\$20,000.00

Standardize evaluations with ranking questions

Review Questions

Enter the total score for the Program area. Max of 30

Additional comments for the Program area
You have used 19 of 500

B I U |  |  |  |  | 

Good programs. Outreach unclear.
Accessible. Programs for seniors, adults
and kids. Good classes. Expanding variety.

Multiple rounds, so entire review is done online

Additional Comments

This is a practical approach. The scope of the program across age groups and its success last year are big pluses.

Save 

Submit 




GrantMaker

GrantMaker - Intake Forms - Mozilla Firefox

File Edit View History Bookmarks Tools Help

GrantMaker - Intake Forms



THE HENDRICK FOUNDATION

Evaluator Extranet [Logout](#)

[Administrative Index](#) > [Intake Form List](#) > Generate Intake Form HTML

Generate Intake Form HTML

Field	Include	Required
Project Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Executive Summary	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Financial Statements	<input type="checkbox"/>	<input type="checkbox"/>
Annual Report	<input type="checkbox"/>	<input type="checkbox"/>
Public Information Release Form	<input type="checkbox"/>	<input type="checkbox"/>
Applicant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contact First Name	<input type="checkbox"/>	<input type="checkbox"/>
Contact Last Name	<input type="checkbox"/>	<input type="checkbox"/>
Contact E-mail Address	<input type="checkbox"/>	<input type="checkbox"/>
Contact Phone Number	<input type="checkbox"/>	<input type="checkbox"/>
Address 1	<input type="checkbox"/>	<input type="checkbox"/>
Address 2	<input type="checkbox"/>	<input type="checkbox"/>
City	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Postal Code	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>
Region	<input type="checkbox"/>	<input type="checkbox"/>
Requested Total Funding	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Approved Quarterly Funding	<input type="checkbox"/>	<input type="checkbox"/>
Meeting Date	<input type="checkbox"/>	<input type="checkbox"/>

Generate Intake Form

The Hendrick Foundation - Evaluator Extranet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

The Hendrick Foundation - Evaluator ...

London harbor since 1813.

Now, it sees about a half million visitors each year. Time and the harsh marine environment are taking a toll on the lighthouse and adjacent structures. The project needs about \$500K in total but they are seeking this grant to cover the cost of a new roof.

Notes - General:

Comments

- Admin, Closerware wrote on December 30, 2008 1:29:40 PM ✘
 - I love this proposal! Let's fund it!
- Two, Evaluator wrote on January 21, 2008 1:57:53 PM
 - I agree with Nancy's approach and would approve only \$15K out of the \$25K. I think even considering the damage to the sub-structure they could find better pricing.
- Four, Evaluator wrote on January 21, 2008 1:03:04 PM
 - I would approve the entire amount
- One, Evaluator wrote on January 21, 2008 12:53:50 PM
 - I agree that this is a no-brainer kind of project. I also think the \$25K budget is probably accurate - just because of the extend of the damage to the sub-structure. Maybe approve the entire amount subject to a review of the 3 estimates they received?
- Three, Evaluator wrote on January 21, 2008 12:39:39 PM
 - I think this is a great project by an organization that has demonstrated success in the past. My only concern is that they could probably do this roof for a lot less than the amount they are requesting. This just based on my past experience with similar projects. I would approve \$15,000.

Add A Comment

* Note that clicking the "Submit Comment" button will not submit your ratings as they are two separate forms.

Submit Comment

My Ratings

Significance

Approach

1 2 3 4

Feasibility

Poor Satisfactory Good Excellent

Sustainability

* Note that clicking the "Submit Ratings" button will not submit a comment as they are two separate forms.


Submit Ratings

Online Application Comment Rating

The Hendrick Foundation - Evaluator Extranet - Mozilla Firefox

File Edit View History Bookmarks Tools Help

The Hendrick Foundation - Evaluator ...




THE HENDRICK FOUNDATION

Evaluator Extranet [Logout](#)

[My Applications](#)
[Applications List](#)
[Grant Database](#)
[Application Detail](#)

Lighthouse Preservation Corp



Project Name: Rock Point Lighthouse Restoration

Executive Summary: [SampleGrantApp.pdf \(659 KB\)](#)

Financial Statements: [sample_app_file.pdf \(659 KB\)](#)

Annual Report: [sample_app_file.pdf \(659 KB\)](#)

City: Old Lyme

State: CT

Requested Total Funding: \$25,000.00

Executive Summary: Old Lyme residents are hoping you can help them restore a national treasure. The lighthouse on Rock Point's north shore has helped guide mariners traveling to the New London harbor since 1813.

Now, it sees about a half million visitors each year. Time and the harsh marine environment are taking a toll on the lighthouse and adjacent structures. The project needs about \$500K in total but they are seeking this grant to cover the cost of a new roof.

Notes - General:

Current Average Ratings

Significance	<input type="radio"/>
Approach	3.50
Feasibility	Good
Sustainability	☆☆☆☆

Overall Application Score

13.2 / 16.0

My Application Score

14.0 / 16.0

My Ratings


Significance	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Approach	1	2	3	4

Online Application Review

GrantMaker - Bulk Application Tool - Mozilla Firefox

File Edit View History Bookmarks Tools Help

GrantMaker - Bulk Application Tool



THE HENDRICK FOUNDATION

Evaluator Extranet [Logout](#)

[Administrative Index](#) > Bulk Application Tool Main

Bulk Application Tool

Edit Filter

Filter Match All Criteria [apply](#)

Filter Criteria Include All

Add

-- Choose One --

Total List Size: 8

[Edit](#)


<input checked="" type="checkbox"/>	Applicant	Grant Opportunity	User Queue	Application Status
<input checked="" type="checkbox"/>	Bridgeport School District	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending
<input type="checkbox"/>	Clark County University	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Approved
<input checked="" type="checkbox"/>	Coats for Kids	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending
<input checked="" type="checkbox"/>	Homes for Hope	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending
<input type="checkbox"/>	Learning Matters	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending
<input checked="" type="checkbox"/>	Lighthouse Preservation Corp	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending
<input type="checkbox"/>	Plattsville Land Trust	The Hendrick Foundation Grant: 3rd Quarter Grant Opportunity	Unassigned Applications	Pending

Bulk Application Tool

GrantMaker - Report Main - Mozilla Firefox

File Edit View History Bookmarks Tools Help

GrantMaker - Report Main



THE HENDRICK FOUNDATION

Evaluator Extranet [Logout](#)

[Administrative Index](#) > Reports

Reports

Report List

Name	Description	
Application List	Column oriented listing of Grant Applications	run
Application Detail List	Applications with associated Rating Summary and Comments	run
System User List	System User information with assigned Queues and Roles	run
Application Queue Assignment	Application Queues with Assigned Reviewers	run
Application Review Status	Applications and Assigned Reviewers with Review Status	run
Application Reviewer Matrix	Applications and Reviewer Scores Matrix	run

Memorized Reports

Report Type	Name	Description	
Application List	Minnesota Over \$10		run edit delete
Application Detail List	Business Office Report		run edit delete
Application List	App Board Report	description	run edit delete
Application List	compliance		run edit delete
Application Detail List	Quarterly Individuals served report		run edit delete
	Another new report that i created		run edit delete

Custom Reporting



CyberGrants

This vendor was invited but chose not to provide any background information for the 2009 comparative grants management system product and service chart or any screenshots of recent system enhancements

“Some of the Technical Enhancements”

(Unspecified by CyberGrants which may be currently in production and which are planned for the future)

- Additional Reporting Enhancements
- Additional Dashboard Enhancements
- Improvements to Knowledgebase and Customer Self-Service for Support and Ticketing
- Integration with Global NGO Repository (glad to see that is moving forward as quickly as it is)
- Volunteer Program Enhancements and Universal Volunteer Opportunity Database
- Mobile Application(s)
- Enhancements to the Applicant Portal
- Enhancements to the Employee Giving Employee Portal
- Enhanced CRM capabilities



Grant LifeCycle Manager (GLM) FaxToFile optional add-on

Data Export

1. Choose Export Type – Grants, Contacts, Application, etc.

2. Set filter parameters

3. Generate csv/Excel file

Data Export

Choose Data Source* ?

Choose Process(es)
Burkitt Application-Catholic Organizations
Burkitt Application-General (Non-Catholic Organization) (Ended: 09/01/2009)
El Paso Community Foundation Application (Ended: 09/01/2009)
Hightower Application (Ended: 09/01/2009)

- All Processes

Choose Organization(s)
Angelo Catholic School
Annunciation House
Annunciation Maternity Home
Archdiocese of Galveston-Houston

- All Organizations

Show Data After* ?

Show Data Before* ?

<input checked="" type="checkbox"/> Process	<input checked="" type="checkbox"/> Organization Name	<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Organization Tax Id	<input checked="" type="checkbox"/> Middle Name
<input checked="" type="checkbox"/> Submitted Date	<input checked="" type="checkbox"/> Organization Website	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> Amount Awarded	<input checked="" type="checkbox"/> Organization Description	<input checked="" type="checkbox"/> Business Title
<input checked="" type="checkbox"/> Date Awarded	<input checked="" type="checkbox"/> Organization Contact Id	<input checked="" type="checkbox"/> Created On
<input checked="" type="checkbox"/> Grant Type	<input checked="" type="checkbox"/> Organization Email	<input checked="" type="checkbox"/> Contact Id
<input checked="" type="checkbox"/> Project Name	<input checked="" type="checkbox"/> Organization Phone Number	<input checked="" type="checkbox"/> Email
<input checked="" type="checkbox"/> Project Description	<input checked="" type="checkbox"/> Organization Mobile	<input checked="" type="checkbox"/> Phone Number
<input checked="" type="checkbox"/> Amount Requested	<input checked="" type="checkbox"/> Organization Fax	<input checked="" type="checkbox"/> Mobile
<input checked="" type="checkbox"/> Target Population	<input checked="" type="checkbox"/> Organization Address 1	<input checked="" type="checkbox"/> Fax
<input checked="" type="checkbox"/> Program Area	<input checked="" type="checkbox"/> Organization Address 2	<input checked="" type="checkbox"/> Address 1
<input checked="" type="checkbox"/> Geographic Area	<input checked="" type="checkbox"/> Organization City	<input checked="" type="checkbox"/> Address 2
<input checked="" type="checkbox"/> Funding Type	<input checked="" type="checkbox"/> Organization State	<input checked="" type="checkbox"/> City
<input checked="" type="checkbox"/> Funding Recommendation	<input checked="" type="checkbox"/> Organization Postal Code	<input checked="" type="checkbox"/> State
<input checked="" type="checkbox"/> Grant Number	<input checked="" type="checkbox"/> Organization Country	<input checked="" type="checkbox"/> Postal Code
<input checked="" type="checkbox"/> Organization Id	<input checked="" type="checkbox"/> Role	<input checked="" type="checkbox"/> Country

- All Columns

Sort By
 +

Organization Summary Page

View entire relationship with grantees via single page:

1. Contact Info
2. Description
3. Contacts
4. Grant History
5. Comments
6. Supporting Docs

Organization Summary

Museum of the Rockies
3123 Vista Lane
Bozeman , MT 50987

Website <http://www.museumoftherockies.org>
Phone Number 406-509-0985
Tax ID 98-6543217
Last Updated 7/8/2009

[Edit](#)

Organization Description

The Museum of the Rockies inspires visitors to explore the rich natural and cultural history of America's Northern Rocky Mountains. In partnership with Montana State University, the Museum reaches diverse communities with engaging exhibits, educational programs, and original research that advance public understanding of the collections.

[Edit](#)

Organization Contacts

NAME	TITLE	EMAIL	PHONE NUMBER
Jane Director	Executive Director	janedirector@foundant.com	406-509-0985
John Applicant	Program Officer	john@foundant.com	406-509-0987

[Add Contact](#)

Organization Application and Grant History

DATE	PROJECT NAME	TYPE OF GRANT	STATUS	GRANT AMOUNT	PAID AMOUNT
7/8/2009	Montana School Visits	One Time	Follow Up Complete	\$25,000.00	\$0.00
7/15/2009	Funding of New Exhibit	N/A	Evaluations Closed	\$0.00	\$0.00
8/5/2009	THE LIVING HISTORY FARM	One Time	Follow Up Submitted	\$2,500.00	\$0.00
8/11/2009	Community Support	Installment	Granted	\$50,000.00	\$0.00
9/18/2009	2010 Capital Campaign	N/A	Application Draft	\$0.00	\$0.00
10/5/2009	2010 Fund	One Time	Granted	\$2,000.00	\$0.00

[Enter Grant](#)

Organization Comments

[Add Comment](#)

7/8/2009 12:22:13 PM - (Scott Huston)
Two family members (Nancy and CharlesII) have served as Board of Directors in the past. Currently there are no family members serving or associated with MOR.

Documents

DESCRIPTION	TYPE	DATE	FILE
2008 Audited Financials	Other	7/8/2009	BGCA2005Audit.doc Delete

[Add Document](#)

Manual Grant Entry

Organization Summary

Museum of the Rockies
3123 Vista Lane
Bozeman, MT 50987

Website <http://www.museumoftherockies.org>
Phone Number 406-509-0985
Tax ID 98-6543217
Last Updated 7/8/2009

[Edit](#)

Organization Description

The Museum of the Rockies inspires visitors to explore the rich natural and cultural history of America's Northern Rocky Mountains. In partnership with Montana State University, the Museum reaches diverse communities with engaging exhibits, educational programs, and original research that advance public understanding of the collections.

[Edit](#)

Organization Contacts

NAME	TITLE	EMAIL	PHONE NUMBER
Jane Director	Executive Director	janedirector@foundant.com	406-509-0985
John Applicant	Program Officer	john@foundant.com	406-509-0987

[Add Contact](#)

Organization Application and Grant History

DATE	PROJECT NAME	TYPE OF GRANT	STATUS	GRANT AMOUNT PAID	AMOUNT
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7/15/2009	Funding of New Exhibit	N/A	Evaluations Closed	\$0.00	\$0.00
8/5/2009	THE LIVING HISTORY FARM	One Time	Follow Up Submitted	\$2,500.00	\$0.00
8/11/2009	Community Support	Installment	Granted	\$50,000.00	\$0.00
9/18/2009	2010 Capital Campaign	N/A	Application Draft	\$0.00	\$0.00
10/5/2009	2010 Fund	One Time	Granted	\$2,000.00	\$0.00

[Enter Grant](#)

Organization Comments

[Add Comment](#)

7/8/2009 12:22:13 PM - (Scott Huston)
Two family members (Nancy and Charlesll) have served as Board of Directors in the past. Currently there are no family members serving or associated with MOR.

Documents

DESCRIPTION	TYPE	DATE	FILE
2008 Audited Financials	Other	7/8/2009	BGCA2005Audit.doc Delete

[Add Document](#)

1. Manually enter grants not initiated through online applications

2. Design fully customized forms to capture desired data

Please describe your project addressing the following:

- Prior Funding
- Project Managers
- Overall Goal

Fund Proposal* ?

[1000 characters left]

IRS Tax Determination Letter* [Browse...](#) [1 MB(s) allowed]
[File Upload Status: No file uploaded.]

Board of Directors* [Browse...](#) [1 MB(s) allowed]
[File Upload Status: No file uploaded.]

Sample Upload [Browse...](#) [8 MB(s) allowed]
[File Upload Status: No file uploaded.]

[Approve](#) [Deny](#) [Application Complete](#)

Knowledgebase Directly Integrated to Software

Access Support Knowledgebase to view tutorials, ask questions, submit incidents, etc.

Community Foundation
FOR PALM BEACH AND MARTIN COUNTIES

Grant Stages Overview
Search Applications
Search Decisions
Grant Process Manager
Form Manager
Report Fields
Budget Manager
Content Manager
Email Manager
Email Attachment Manager
Mail Merge Templates
Organization Manager
User & Role Manager
Fax to File
Report Viewer
Data Export

HELP

Organization Summary

Museum of the Rockies
3123 Vista Lane
Bozeman , MT 50987

Edit

Organization Description

The Museum of the Rockies inspires visitors to explore Mountains. In partnership with Montana State University educational programs, and original research that advan

Edit

Organization Contacts

NAME	TITLE
Jane Director	Executive Director
John Applicant	Program Officer

Add Contact

Organization Application and Grant History

Answers Ask a Question My Stuff Help

Search Browse

Logged in as: scott.campbell@ejaf.org

Search by Product Search by Category Search by Keyword Search Tips

All All

Search

Powered by RIGHT NOW

39 Answers Available

Page: 1 of 2

Summary

- New** - Hidden Passwords
- Board and Staff Tutorial
- Is there a way that I can edit the data to correct the errors that I made when entering the data?
- Ways to use Electronic Signatures in Grant Lifecycle Manager
- Attaching applications to a process.
- Updated** - Applicant Tutorial
- Can board evaluations be done with a yes or no rather than the numeric scale?
- How do I use the Fax to File tool?
- Updated** - Can grantees choose more than 1 option from a radio button or drop-down list?
- How can I incorporate a document or template into an application process?
- When do email notifications send me a message?
- Is there a possibility of text fields for a board member to enter a detailed explanation of his/her reasoning?
- I was trying to edit a board evaluation form, but the edit buttons aren't available for use.
- Updated** - New Board Members are not showing up on previously loaded processes.
- New** - Adding new users
- How do applicants check the status of their grant request?
- Updated** - Can an applicant upload more than one file in one upload field.
- How do applicants register with the Grant Lifecycle Manager?
- Bouncing to logon screen after saving a draft.
- New** - An applicant has registered, how do they change their password?

Page: 1 of 2

Mailmerge



ELTON JOHN AIDS FOUNDATION

Welcome Scott
Log Off

Grant Stages Overview

Search Applications

Search Decisions

Grant Process Manager

Form Manager

Report Fields

Budget Manager

Content Manager

Email Manager

Email Attachment Manager

Mail Merge Templates

Organization Manager

User & Role Manager

Fax to File

Report Viewer

Data Export

HELP

Instructions

The MasterTemplate.doc link below is to a Word Document containing all of the Mail Merge fields that your merge templates can contain. Use the Master Template to copy and paste fields into any document you would like to use for Mail Merge and then use the upload field below to store the document to the server.

Uploading a document with the same name WILL overwrite the previous version of that file

Once you have uploaded documents you can use any of the mail merge links in the software and choose the template to merge.

[MasterTemplate.doc](#)

Upload Template

Current Template List

TEMPLATE FILENAME	DELETE
Grant Award Transmittal Letter EJAF.doc	Delete

Create unlimited merge templates for use in bulk or individual correspondence

Restricted Processes

The image shows two screenshots of the Community Foundation application page. The top screenshot shows the 'Access Code' field empty, and the bottom screenshot shows it filled with '12345'. A red box highlights the text 'Restricted Processes only available to applicants after entering an access code' with arrows pointing to the 'Access Code' field and the 'Employee Matching Grant Program' section.

Community Foundation
FOR PALM BEACH AND MARTIN COUNTIES

Welcome John
Log Off

Start New Application
Application Status
Fax to File

Access Code

Enter

Application Page
Please click the link below to begin the application process.

Standard Grants Program
Standard grants are for grant amounts between \$5,000 and \$25,000 that match our foundations guidelines
Our guidelines may be viewed here: [Foundation Guidelines](#)

Micro Grants Program
Micro Grants are grants for up to \$5,000 for emergency funding or special projects.

Micro found:

Community Foundation
FOR PALM BEACH AND MARTIN COUNTIES

Welcome John
Log Off

Start New Application
Application Status
Fax to File

Access Code
12345

Enter

Application Page
Please click the link below to begin the application process.

Standard Grants Program
Standard grants are for grant amounts between \$5,000 and \$25,000 that match our foundations guidelines
Our guidelines may be viewed here: [Foundation Guidelines](#)

Micro Grants Program
Micro Grants are grants for up to \$5,000 for emergency funding or special projects.
Micro grants for special projects or operating support are generally only awarded to agencies that have prior relationship with our foundation.

Employee Matching Grant Program
This grant program is for recording Employee Matching Gifts. Do Not Use unless instructed by a foundation staff member.

Restricted Processes only available to applicants after entering an access code



Foundation Source Back Office®
Foundation Source Client Services™
Foundation Source Online®
Foundation Source Requests®
Foundation Source Advisors
Foundation Source Program Office

There are 34460 charities that match your search criteria. You can further refine your search or click on any charity name to view information about it. To grant to this charity, or add it to your favorite charities, click on the appropriate button. If you cannot find the charity you're looking for, [click here](#) so that we may assist you.

Find a Charity
Advanced Search
Browse by Category
Add Charity

Search

Sort by [Charity Size](#) **Alphabetically**

Limit to City State - Select One - Update

ALL
#
A
B
C
D
E
F
G
H
I
J
K
L
M
N
O
P
Q
R
S
T
U
V
W
X
Y
Z

✖ [10-13 CLUBS OF AMERICA INC](#)
3221 WHITE IBIS CT APT B1 , PUNTA GORDA, FL 339508604

✔ [100 BLACK MEN OF AMERICA](#)
PO BOX 12275, AUGUSTA, GA 309142275

✔ [100 BLACK MEN OF AMERICA - CANTON CHAPTER](#)
PO BOX 202, CANTON, MS 390460202

✔ [100 BLACK MEN OF AMERICA INC](#)
141 AUBURN AVE NE, ATLANTA, GA 303032503

✖ [100 BLACK MEN OF AMERICA INC CINCINNATI CHAPTER](#)
PO BOX 1457, CINCINNATI, OH 452011457

✔ [100 BLACK MEN OF AMERICA INC GREATER DALLAS CHAPTER](#)
PO BOX 226081, DALLAS, TX 7522226081

✔ [1000 MISSIONARY MOVEMENT NORTH AMERICA INC](#)
PO BOX 1673, OWENSBORO, KY 423020000

✖ [1ST CAPTAINS COMPANY ROYAL WELCH FUSILIERS IN AMERICA LTD](#)
11004 HIGHRIDGE ST, FAIRFAX STA, VA 220391831

✔ [21ST CENTURY AMERICA FOUNDATION](#)
7501 CARROLL AVE, TAKOMA PARK, MD 209125715

✔ [4TH COMPANY BRIGADE OF GUARDS IN AMERICA LTD](#)
1 TIMBER RIDGE CT, GREENSBORO, NC 274075047

Charity Icons

Define foundation reports.

Standard Custom Create

Data Based On: Requests data

Show requests that are: Available for user

Under Review Complete To Be Processed Declined

Show for these dates: Available for user

By Date Range By Years By Relevance

From: 01/01/2009 To: 10/13/2009 From: 2009 To: 2009 Dates: Year-to-Date

Show only:

Fields: Program Area Add Filter

Group by:

Fields: Year Add Group

Report columns:

Fields: Date Received Add Field

Report format:

Header: XYZ Foundation Report Format: HTML Page Size & Orientation: US Letter
 Title: Footer: Prepared by John Doe

Save As Draft Publish Cancel Report Preview

Custom Report Tool

Review your grant letter, make any necessary changes and then click Done.

The screenshot shows a WYSIWYG editor interface. At the top, there is a menu bar with 'Edit', 'Insert', 'Format', 'Paragraph', 'Tools', and 'View'. Below the menu is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent), alignment, and other functions. The main editing area contains the following text:

Bowman Foundation

October 13, 2009

Habitat For Humanity Of Coastal Fairfield County Inc
1470 Barnum Avenue
Bridgeport, CT 06610-3237

Dear Sir or Madam:

At the bottom of the editor, there is a 'WYSIWYG' logo and the text 'edit-on® Pro by RealObjects'.

Done

Discretionary

Budget: \$100,000.00

Remaining: \$52,500.00

**HABITAT FOR HUMANITY OF
COASTAL FAIRFIELD**

COUNTY INC has received 1

prior grant for a total of

\$15,000.00.

The last grant was in the

amount of \$15,000.00 on

03/17/2009.



Learn more about our
new **Charity Reports**

Edit Grant Letter

Below are the notes associated with this Grant Request.

Author	Date	Note	Actions
Grants Administrator	03/15/2009	Attached article Applicant forgot to attach an article. Although not required, it is good to have so I have attached it under "Attachments".	Edit Delete
Program Officer Health	03/16/2009	Overall Impressions We've given to this charity a few times before and always had success with their projects. This particular project seems like a logical extension of what we have done with them in the past.	Edit Delete
Reviewer Two	03/16/2009	Breeding Dependency Is the foundation possibly breeding dependency with this organization? They seem to have a number of other funders now, including a number of new ones this year, which would suggest that their work is getting noticed. Perhaps the foundation could focus on another similar organization that is a few stages back in their development.	Edit Delete
Reviewer One	03/16/2009	I see your point, but... The foundation has been able to effect quite alot of change in the immediate community by supporting this charity. Perhaps an option would be to give less but still be involved. I hate to seem like they are being abandoned for being successful.	Edit Delete
Grants Administrator	04/21/2009	I've just added some notes that you should review Under the charity profile and under their last grant from us in 2006 I have added some additional notes that came from a recent board meeting. They may prove relevant in your review of this organization.	Edit Delete
Grants Administrator	10/13/2009	* Follow-up Spoke with Cheryl today. Need to follow up with her about some items before next Monday.	Edit Delete

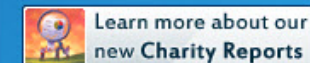
[New Note](#)

- [Return to List](#)
- [Request Information](#)
- [Grant](#)
- [Decline](#)

CHILDRENS MEMORIAL

HOSPITAL has received 3 prior grants for a total of \$200,000.00.

The last grant was in the amount of \$50,000.00 on 06/25/2006.



Notes

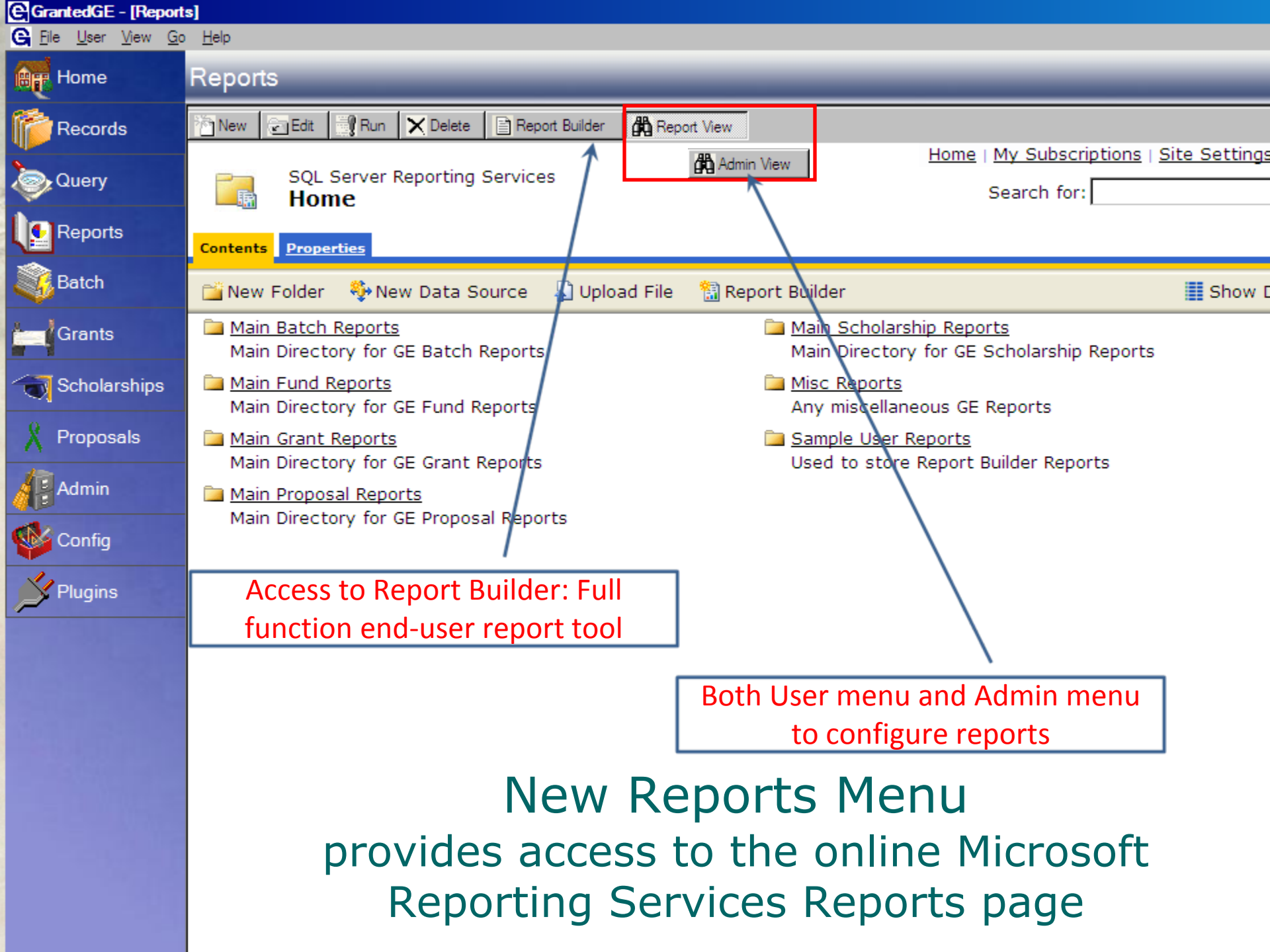
Foundation Source Developments for 4Q 2009 and 2010

- Foundation Source Results

A performance monitoring and reporting system that allows foundations to measure the effectiveness of their grantmaking.



GrantedGE
“Proffer” Online Proposal and
Scholarship Web Modules
IT Assessments and Strategic Planning
Custom Software and Web Development
Managed Services



Access to Report Builder: Full function end-user report tool

Both User menu and Admin menu to configure reports

New Reports Menu
provides access to the online Microsoft Reporting Services Reports page

New Request For Proposal

Save and Close

Summary | Committee | Profile | Criteria | Fund Allocation | Assign Proposals | Media | Info

ID: Status: OPEN

RFP:

RFP Name:

RFP Description:

RFP Type:

Display Via The Web:

Date Established: 01/01/2000 Deadline:

Renewable: Renew Years:

Number Of Awards Per Year: RFPs Awarded:

Total Request For Proposal: \$ 0.00 Total Amount Awarded: \$ 0.00

Minimum Award Amount: \$ 0.00 Maximum Award Amount: \$ 0.00

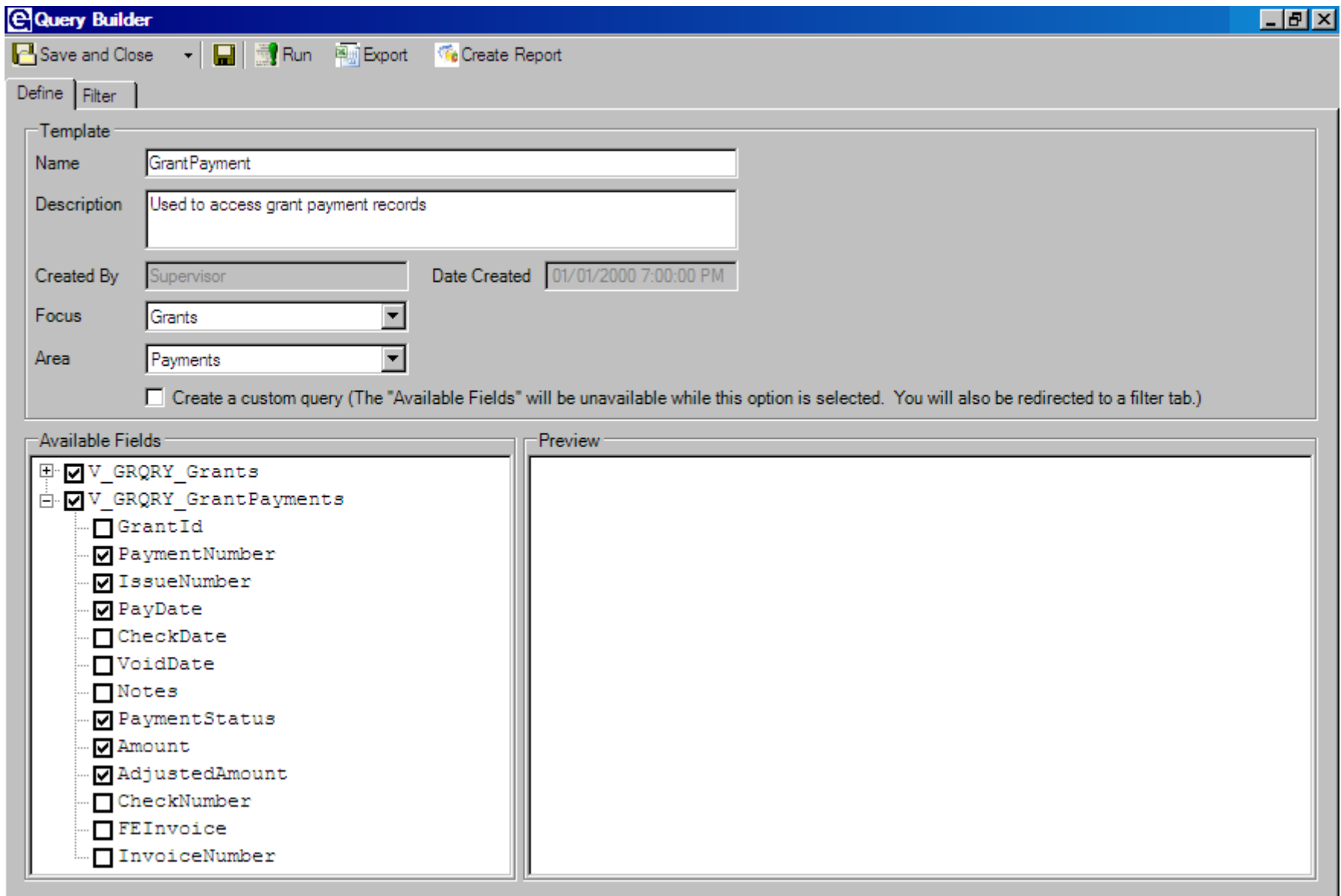
Manager:

Profile Summary	
Detail	Value
▶ RFP Text	
RFP Number	

Target Budget: \$0.00 Allocated Budget: \$0.00 Unallocated Budget: \$0.00

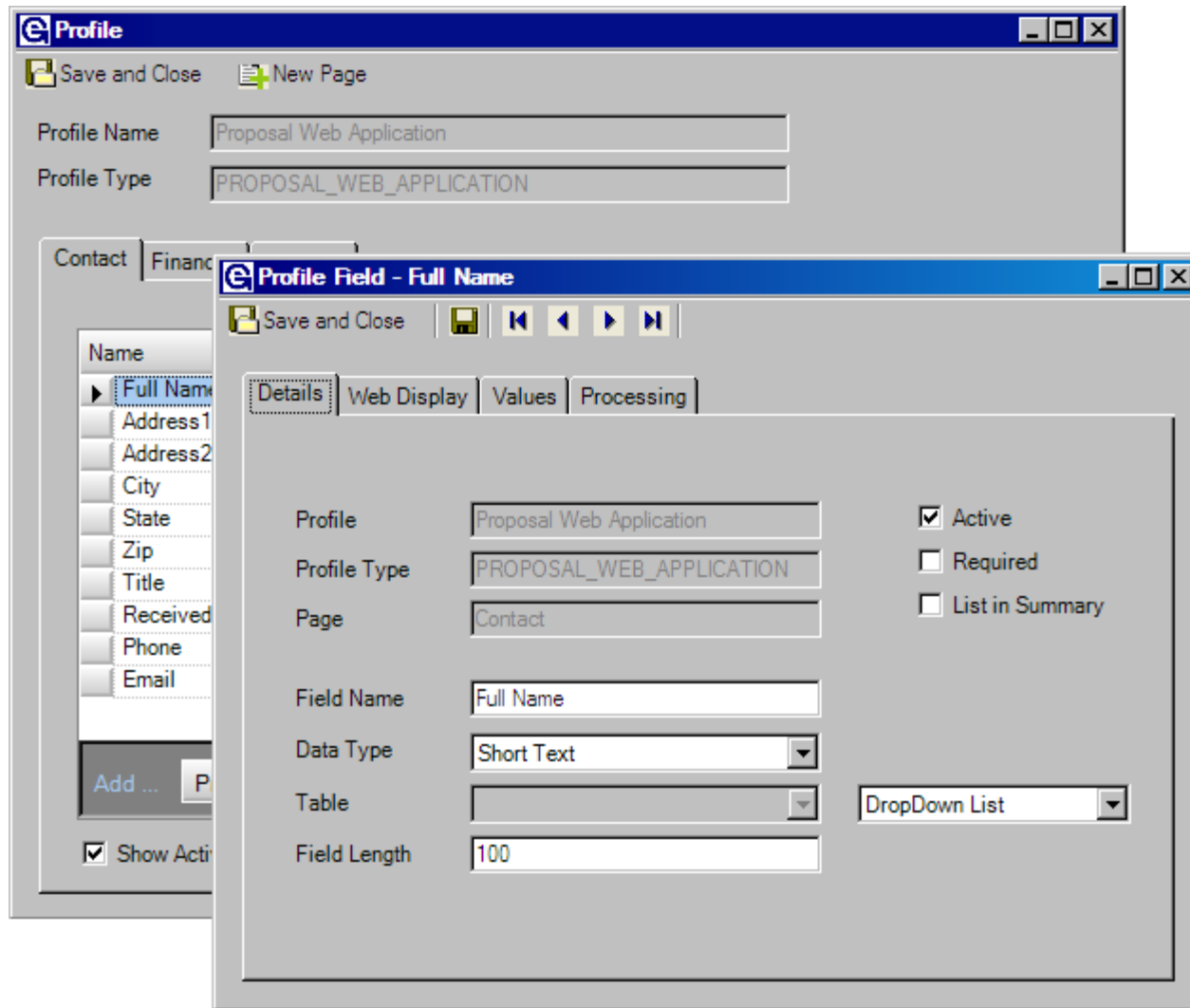
Funds: Proposals:

New Request For Proposal Definition Screen allows users to define an RFP that can be published to the web and also used to group proposals when they are submitted.



New Query Functions

provide users with access to all data fields and group them for
1) export, 2) reporting and 3) correspondence templates



New 'Profile' Functionality

allows users to define unlimited new fields and profile field definition such as 1) data types, 2) Required, 3) Data Validation rules, 4) Data Mapping

New Scholarship Applicant

Save and Close

Applicant | Profile | Institutions | Contributions | Media | Applications | Info

ID Name SSN Status

Enter Budget Items (The Yearly Budget will be automatically calculated)

[Add New Contribution](#)

Contribution Year

Other Grants +

Parent Contributions +

Job Earnings +

Other +

EFC

Required Amount Calculation

Preferred Institution

Required Budget

RequiredAmount

New Institution

Save and Close

Info | Profile | Budgets

ID Institution Name

Enter Budget Items (The Yearly Budget will be automatically calculated)

[Add New Budget](#)

Budget Year Active

Books and Equipment +

Tuition +

Yearly Budget

New 'Budget' Functionality

allows users to track institution budgets and applicants other contributions to automatically calculate financial need

- ▶ [Tables](#)
- ▶ [Business R](#)
- ▶ [Global Setti](#)
- ▶ [Workflow](#)
- ▶ [Characteris](#)
- ▶ [Profiles](#)
- ▶ [Alerts](#)
- ▶ [Banks](#)

The screenshot shows a software configuration interface. On the left is a sidebar with navigation links. The main area contains two overlapping windows. The background window, titled 'Banks', has a 'Close' button and a table with the following data:

BankId
1
2
3

The foreground window, titled 'Bank', is titled 'Sync Banks with Finance System' and has a 'Save and Close' button. It features a 'Details' tab and a 'Check Run Config' button. The configuration options are as follows:

Pre-Processing Steps

- Resolve Account Numbers
- Pre-Validate
- Export To File
- Print Report
- Create Payments in Finance System

Check Printing

- Finance System
- GrantedGE
- Other / None

Post-Processing Update

- Read from Finance System
- Import from file
- Manual Update

New Bank Configuration Features

allow users to define the financial integration and processing of grants based on individual bank preferences

GrantedGE Developments for 4Q 2009 and 2010

- Build more sophisticated report view tools for profiles (user defined fields), characteristics (user defined categories) and workflows (user defined tasks). This will allow end users to access data in the associated tables.
- Provide functionality allowing tracking and management of Contingent (conditional) payments
- Provide enhanced functionality for grant restrictions: functionality restricting grant requests based on funds, recipients, etc.
- Allow tracking of scholarship applicant data (annual academic profiles) across multiple years.
- Add additional security enhancements to provide more granularity to security permissions:
 - Providing specific field-level security.
 - Limiting access to information based on fund type/constituent type
- Provide enhanced Designated Grants functionality including handling of designated grants in batch mode.
- Provide splitting payments across multiple payees.

GrantedGE Web Development for 4Q 2009 and 2010

- Add online grant request and grant application reviews for committees and board members.
- Add online application evaluation and scoring.
- Add online input of established objectives and expected outcomes, with input / evaluation of outcome results.



Web Based Grants Management
Online Customizable Grant
Applications
Full Range of Back Office Support
Services

REGISTRATION

CAMPUS/LOCAL ADDRESS

First Name*	<input type="text"/>
Last Name*	<input type="text"/>
Country*	<input type="text" value="▼"/>
Street Address*	<input type="text"/>
Suite / Building	<input type="text"/>
City*	<input type="text"/>
State*	<input type="text" value="▼"/>
Zip Code*	<input type="text"/>
Phone*	<input type="text"/>
E-mail address*	<input type="text"/>

PERMANENT ADDRESS

Click if address information is the same as above

Country*	<input type="text" value="▼"/>
Street Address*	<input type="text"/>
Building/Apt	<input type="text"/>
City/Town*	<input type="text"/>
State*	<input type="text" value="▼"/>
Zip Code*	<input type="text"/>
Phone*	<input type="text"/>
E-mail address*	<input type="text"/>

Having problems? Please [contact us](#).

Scholarship Registration



[Registre](#)

[Directives](#)

[Instructions](#)

[Vue D'Ensemble](#)

[Questions](#)

SUBVENTIONS D'ENGAGEMENT SOCIAL DE XYZ

Bienvenue au programme de subventions d'engagement social de XYZ. Les pages qui suivent vous permettent de présenter une demande de subvention pour votre organisme. Prenez soin de lire les directives afin de vous assurer que votre organisme répond à nos conditions d'admissibilité. Ou bien, consultez la « Foire aux questions » pour vous faciliter le processus.

Disposez-vous d'un code d'utilisateur et d'un mot de passe pour utiliser ce système?

- [Oui, j'ai un code d'utilisateur et un mot de passe](#)
- [Non, je n'ai pas de code d'utilisateur ni de mot de passe](#)

Nous vous remercions pour l'intérêt que vous avez manifesté. Si vous avez des questions quelconques concernant la demande, n'hésitez pas à nous contacter directement au numéro (aux heures de service à la clientèle, soit de 8:00 à 18:00 HNE), ou contactez-nous par courriel à l'adresse

Remarque : Les demandes sur papier ne sont plus acceptées.

Multilingual Web Pages



GIFTS 6
Essential GIFTS 6
GIFTS Optional Modules
Foundation Information Management
Systems (FIMS)
FoundationPower™ (FP) Custom

- Customizer Fields available with Grant Renewals

Renewal of Grant [673]

Renewed Request Information

Use the same request type as in the original grant
 Select a request type from the list

Request Type:

Request Status:

Carry over all non-primary contact affiliations
 Allow this request to be subsequently 'renewed'
 on or after:

Renewal Activity

Staff:

Date:

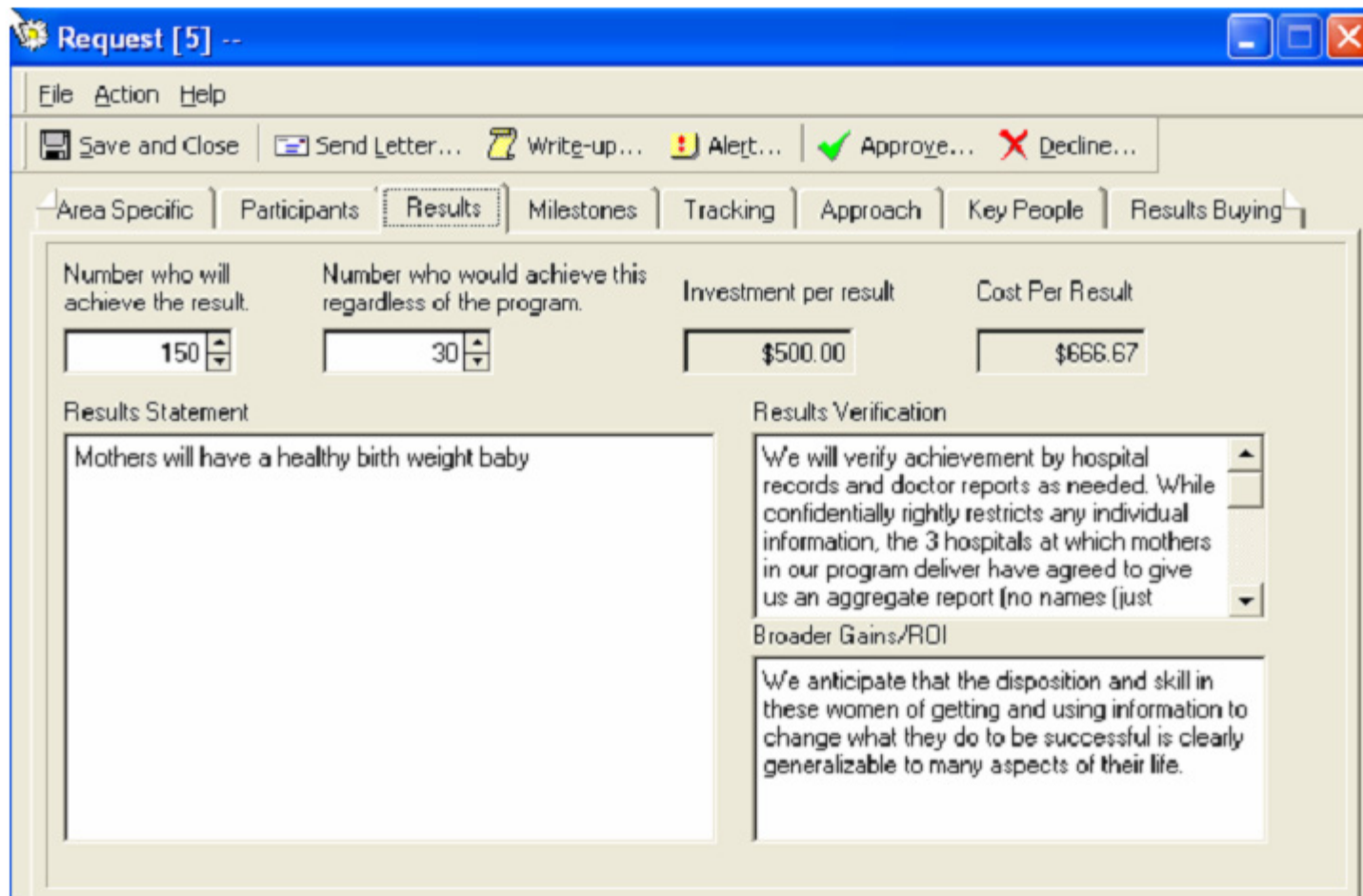
Notes:
(F3 = Spell)

<< Custom Fields

All None

<input type="checkbox"/>	Admin Actual Amount
<input type="checkbox"/>	Admin Budget Amount
<input type="checkbox"/>	Direct Project Budget Amount
<input type="checkbox"/>	Direct Project Exp Actual Amount
<input type="checkbox"/>	Event Attire
<input type="checkbox"/>	Event Date
<input type="checkbox"/>	Event Details
<input type="checkbox"/>	Event Location

- Capture results to measure success



The screenshot shows a software window titled "Request [5] --" with a menu bar (File, Action, Help) and a toolbar containing buttons for "Save and Close", "Send Letter...", "Write-up...", "Alert...", "Approve...", and "Decline...". Below the toolbar are several tabs: "Area Specific", "Participants", "Results" (which is selected), "Milestones", "Tracking", "Approach", "Key People", and "Results Buying".

The main content area is divided into several sections:

- Number who will achieve the result.** Input field: 150
- Number who would achieve this regardless of the program.** Input field: 30
- Investment per result** Input field: \$500.00
- Cost Per Result** Input field: \$666.67
- Results Statement** Text area: "Mothers will have a healthy birth weight baby"
- Results Verification** Text area: "We will verify achievement by hospital records and doctor reports as needed. While confidentially rightly restricts any individual information, the 3 hospitals at which mothers in our program deliver have agreed to give us an aggregate report (no names (just
- Broader Gains/ROI** Text area: "We anticipate that the disposition and skill in these women of getting and using information to change what they do to be successful is clearly generalizable to many aspects of their life."



GIFTS Plus Pack 5 – Link Plus for use with Outlook®

Link email from Outlook to GIFTS

The screenshot shows an Outlook window with an email titled "Letter of recommendation for Anita Rayse- lack of age-appropriate, out-of- school time project - Message (HTML)". The email is from Todd Lapin to Anna Cellini. The subject is "Letter of recommendation for Anita Rayse- lack of age-appropriate, out-of- school time project". There is an attachment named "letter of recommendation.doc (30 KB)".

The email body contains the following text:

Anna,

Attached please find my letter of recommendation. This project addresses enrichment services for youths ages 14 to 16.

Regards,
Todd
Todd Lapin
MicroEdge, Inc.
1135 Kildaire Farm Rd.
Cary, NC 27511
866-895-0872 or 646-237-3907 direct
212-757-1713 fax
919-454-6590 mobile
tlapin@microedge.com

The "GIFTS Link Plus - Matching Options" dialog box is open, showing the following options:

When exporting the selected message to GIFTS:

- Match to existing Activity
- Create new Activity

Link to: existing Request(s)

Quick Search: [] Go Advanced

	Organization	Contact	Request	Subject
<input checked="" type="checkbox"/>	The Children's Fund	Charles Roberts robertsc@tcf.org	785 This project addresses the lack of age-app...	Letter of recommendation for Anita Rayse-lack of age-appr...

Next Finish Cancel



IGAM 3 for FIMS

- Use custom fields from FIMS on your application form to collect virtually any type of information

Form Design Wizard [35006]

File Action Help

Save and Close Activate Deactivate

Properties Quiz Fields Codes Attachments Links Design Graphics Activate

Choose the fields that should be included on each page of your application form. You can provide your own label and description for each field.

Select Page:
Project Information

Select Fields from:
Application

Age Group
Alternate Contact Name
County
Disability
Economic Group
Effect
Ethnic Group
Fund ID
Gender
Notes
Population
Program Officer
Project
Project Description
Project End Date
Project Start Date
Recommended Amount
Request Date
Request Type
Risk
Strategy
Sub-Program

Add >>
<< Remove

Show all pages Show only current page

Page	Name	Label	Req
Contact	Grantee: Zip Code	Zip Code	Yes
Contact	Grantee: Phone	Phone	Yes
Contact	Grantee: Fax	Fax	No
Contact	Grantee: E-mail Address	E-mail Address	No
Contact	Grantee: Web Site	Web Site	No
Contact	Text: Header	Fiscal Sponsor Information (if applicable)	No
Contact	Fiscal Sponsor: Organization Name	Organization Name	No
Contact	Fiscal Sponsor: Address Line 1	Address Line 1	No
Contact	Fiscal Sponsor: Address Line 2	Address Line 2	No
Contact	Fiscal Sponsor: City	City	No
Contact	Fiscal Sponsor: State	State	No
Contact	Fiscal Sponsor: Zip Code	Zip Code	No
Contact	Fiscal Sponsor: Phone	Phone	No
Project	Application: Request Amount	Dollar Amount Requested	Yes
Project	Application: Notes	Organization Mission and Background	Yes
Project	Application: Program Name	Enter the name of the current program	No
Project	Application: Project Description	Project Description (to be used in publications)	Yes
Project	Application: Region	Region served for this project	Yes
Project	Application: Program Area	Program Area	Yes
Project	Application: Who_are_participants	Who are participants	No

Move Up Move Down

Field Details

Label (F3 = Spell) Who are participants Required Read-only

Description (F3 = Spell) Give a brief description of all participants Height (in lines) 4

Word Limit Display decimals separately Width (in chars) 42

<< Back Next >>



IGAM 4 for GIFTS

- Requirements Forms

- : Publish online forms for requirements

- : Seamlessly collect progress and final reports

End of Grant Report - Direct Service

[Exit](#) [Help](#) [Contact Us](#)

❖ Required before final submit Page [1](#) [2](#) [3](#) [Review My Application](#) [Printer Friendly Version](#)

Your Results

a) You projected that of the persons you worked with, 75 participants would achieve the following result:
Will have healthy birth weight babies

❖ Tell us what happened - By the end of the grant period, how many achieved this result?

b) Here is a reminder of the predictive factors you identified to see that participants are on course to achieving results:
Entered program during first tri-mester
Making most scheduled appointments
Plus establishing the key relationship we rely upon before the end of the first trimester. We look for women who say they want to stay in touch with this person and value the connection.

❖ c) How successful were you in achieving the results you committed to?
 ▼

- Specify Default Values for Form Fields
 - : Pre-code request information, saving time and ensuring complete
- Display Request Status on Grantee Account Page
 - : Applicants can view the request and reporting status online



West 54ST FOUNDATION

My Account
[Contact Us](#) [Help](#) [Sample Documents](#) [Exit](#)

[Applications](#) [Requirements](#)

Account: [anna@microedge.com](#)

[Change E-mail/Password](#)

The West 54th Street Foundation has provided you with this online tool to manage your reporting schedule.

2009 - 2010 Grant Reporting Cycle

First Quarter - July, August September	Progress Report
Second Quarter - October, November, December	Mid-Term Report
Third Quarter - January, February, March	Financial Report
Forth Quarter - April, May, June	Year End Report & Financials

Open Requirements
 The following requirements have not yet been submitted.

Form Name	Project Title	Type	ID	Due	Updated	Action
You currently have no OPEN requirements.						

Submitted Requirements
 These requirements have already been submitted. To view a summary of the requirement information, click the form name.

Form Name	Project Title	Type	ID	Due	Submitted	Action
Progress Report	Parallel Rapid HIV Antibody Testing during Pregnancy	Final Report	3721	03/31/2014	04/09/2009 12:31:13 PM	
Progress Report	Parallel Rapid HIV Antibody Testing during Pregnancy	Progress Report	3719	12/31/2012	04/09/2009 12:35:46 PM	
Progress Report	Parallel Rapid HIV Antibody Testing during Pregnancy	Progress Report	3828	04/30/2009	04/30/2009 9:47:41 AM	

- Interfund quick entry

Interfund Entry
✕

Transfer Amount:

Batch:

Description:

Grant

Fund ID: Administrative Endowment

ID Code: Operating Fund - Interfund Grants

Date:

Print Check

Automatic Payment Use Grant Number

Payment Number:

Payment Date:

E-Mail Notification

Grant

Finance

Gift

Fund ID: Operating Fund

ID Code: Interfund - General Operating

Date:

E-Mail Notification



MicroEdge FIMS CRM

- A tailored version of Salesforce CRM for FIMS
- Comprehensive constituent relationship management
 - : Track donor opportunities
 - : Manage profiles
 - : Manage events
- Fully integrated

The screenshot displays the Salesforce Enterprise Edition interface for MicroEdge FIMS CRM. The browser address bar shows the URL: <https://cs1.salesforce.com/006500000021nFr>. The page title is "Opportunity: James Barclay-2009-03-15". The user is logged in as "AS DONOR SRVS USER".

The main content area shows the "Opportunity Detail" for "James Barclay-2009-03-15". The record is categorized as "Event/Attendance Information".

Event/Attendance Information	
Opportunity Name	James Barclay-2009-03-15
Profile Name	James Barclay
Type	Event Registration
Registration Supporter Option	
Stage	Gift Payment Received
Fee Amount	\$500.00
Donation Amount	\$1,000.00
Amount	\$1,500.00
Inkind Gift Value	
Opportunity Record Type	Event Attendance Support Change
Event	2009 Dinner Dance
Close Date	3/15/2009
Probability (%)	100%

Additional information shown includes:

- Attendee Count:** 2
- Table Team:** 2
- System Information:** Created By: Donor Srvs User, 3/15/2009 11:19 AM; Last Modified By: Donor Srvs User, 3/15/2009 11:20 AM; Primary Campaign Source: 2009 Dinner Dance



Essential GIFTS Online / GIFTS Online *(Currently in limited release – rollout targeted in 2010)*

- Currently in Limited Release
- Secure, online, hosted solution available 24/7
- Comprehensive services tailored to each client
- Full grants management covering the entire grants lifecycle
- Anytime, anywhere access
- Tailored views and workflow to each user
- Self-service reports for analysis
- Customize full GIFTS Online to track data specific to your grantmaking
- + GIFTS Online includes online review capabilities allowing staff to submit and report their scores online



Essential GIFTS Online / GIFTS Online

Sample homepage & available actions

Joel Smith's Essential GIFTS Online

Home Settings Help Logout

Layout

Essential GIFTS Online

Grants Manager Tasks

Quick Search

Organizations

Contacts

Requests

New Proposals

Organization	Contact	Requested	Project Title	Program Area & Staff
Children International Kansas City, MO	Mr. James R. Cook (800) 888-3089	\$150,000.00 7/23/2009	Non-Formal Education Program	Education Magdalena Novakova
Big Brothers Big Sisters of New York City New York, NY	Ms. Mary (212) 686-1			

Items 1 - 2 of 2

J Smith's Essential GIFTS Online

Home Settings Help Logout

Organization

California Children's Theatre, San Francisco CA

Available Actions

- Edit Organization
- Add New Request
- Add New Activity
- Link/Upload Document
- Change Primary Contact
- Add New Contact
- Add Affiliation
- Generate Letter Correspondence
- Generate E-mail Correspondence
- Delete Organization

Organization Information

Name California Children's Theatre [GuideStar](#)

Aka Fantasy Theatre

Address 2234 South St.
Suite 913
City San Francisco
State CA
Postal Code 94078
Phone (405) 555-5544
Fax

E-mail Address info@cachildren.org

WWW Address www.cachildren.org

Total Budget 0

Parent

Background The California Children's Theater is a touring company for children and programs for urban children from ages 5 - 16. The company tours new plays in hospitals, schools and playgrounds.

Each year the company hosts a playwriting contest for young writers.

Grants This Year by Program Area

Arts and Culture
Civic and Community
Education
Health and Human Services

Under Review

Organization	Contact
Big Brothers Big Sisters of New York City New York, NY	Ms. Mary Jo (212) 686-1
The Childrens Scholarship Fund New York, NY	Ms Georgina (212) 555-4
The Childrens Scholarship Fund New York, NY	Mr Al Jenner (212) 555-4
University Of Pennsylvania Medical Philadelphia, PA	Mr. Lawrence Stewart (215) 662-4
New York Youth Sing for Peace New York, NY	Ms. Jamie E 212-555-78

Items 1 - 5 of 9

Saved Searches

Payments for this Organization

Contingent payment of \$25,000 due 10/23/2009

Awarded \$100,000 on 12/30/2008

2009 Theatre Programs

Payment # 4 of 4





Foundation Grant Manager

Foundation Grant Manager Community Edition

Foundation Grant Manager Home Page

Brad Helies at Foundation Grant Manager
Monday October 19, 2009 Winter '10 for Developers

Dashboard Refresh Customize Page
As of 9/28/2009 12:34 PM

CY Contributions **CY Awarded** **CY Grant Amounts**

Sum of Contribution Amount
\$0 **\$3,470,516** \$3,470,516

Sum of Awarded Amount
\$0 **\$1,405,020** \$1,500,000

Status	Sum of Contribution Amount
Grant Awarded	\$1.3M
Forecasted	\$1.3M
Application Under Consideration	\$450K
Application Submitted	\$155K
Application Invited	\$143K
Application Approved by Board	\$60K
Application Approved (Internal)	\$40K

Amount of Current Year Grants by Status

Calendar New Event Calendar Help
Today 10/19/2009
You have no events scheduled for the next 7 days.

October 2009
Sun Mon Tue Wed Thu Fri Sat
27 28 29 30 01 02 03
04 05 06 07 08 09 10

The Homepage displays individually-selected metrics, a list of personal tasks, and navigation controls to quickly find the specific information the user needs.

Letter of Inquiry

The screenshot displays the Salesforce Foundation Grant Manager interface. The top navigation bar includes links for Setup, System Log, Help, and Logout, along with the force.com logo and a dropdown menu for Grants & Apps. The main navigation tabs are Home, LOIs, Organizations, Contacts, Grants & Apps, Reports, Dashboards, and Dockets. The left sidebar contains a search box, a 'Limit to items I own' checkbox, an 'Advanced Search...' link, a 'Create New...' dropdown, and a 'Recent Items' list with entries like 'Brad Helies', 'Green Design - Living Green Education Seminars 2009', and '2008 - Health'. A 'Recycle Bin' link is also present at the bottom of the sidebar.

The main content area shows the LOI detail for 'Brad Helies'. The header includes a star icon, the name 'LOI Brad Helies', and links for Printable View, Customize Page, Edit Layout, and Help for this Page. Below the header are links for LOIs History (2), Open Activities (0), Activity History (5), HTML Email Status (5), and Notes & Attachments (0). The 'LOI Detail' section features buttons for Edit, Delete, Convert, Clone, and Find Duplicates. The details are organized into several sections:

- Organization:** Green Design
- Docket:** Fiscal Year 09, LOIs Status New
- Project Name:** Living Green Seminars 2009
- Request Number:** 09-Need an Autonumber Value
- LOI Submission Date:** 9/22/2009 12:27 PM
- Requested Amount:** (empty field)

The **Primary Contact** section lists the following information for Brad Helies:

- Name:** Brad Helies
- Email:** brad.helies@npowerny.org
- Middle Initial:** (empty field)
- Phone:** (212) 444-7451
- Suffix:** (empty field)
- Fax:** (212) 564-7009
- Title:** Senior Manager
- Web Address:** http://www.greendesign.org
- Address:** 3 Metrotech Center, Brooklyn, NY 11201, USA

The **Timeframe** section includes fields for Proposed start date of the project and Proposed end date of the project.

The **Narrative** section includes a field for Grant Purpose.

The **Board Summary** section includes fields for Other Sources of Project Funding and Other Sources of General Funding.

The Letter of Inquiry process allows organizations to track, manage and report on prospective grant applicants during this preliminary prescreening process.



Grants & Apps: Green Design - Living... Setup · System Log · Help · Logout force.com apps Grants & Apps

Home | LOIs | Organizations | Contacts | **Grants & Apps** | Reports | Dashboards | Dockets

Search
Search All
 Limit to items I own
Advanced Search...
Create New...

Recent Items
Green Design - Living Green Education Seminars 2009
Brad Helles
Brad Helles
Green Design
2008 - Health
Arts
April 2009 Docket
Default EQ
Chris Cullen
New EQ1
Recycle Bin

Grants & Apps
Green Design - Living Green Education Seminars 2009 [Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help](#)

[Contact Roles \(1\)](#) | [Open Activities \(0\)](#) | [Activity History \(5+\)](#) | [Check Requests & Payments \(3\)](#) | [Grantee Reports \(3\)](#) | [Benchmarks & Conditions \(0\)](#) | [Contributing Programs \(5+\)](#) | [Reviews \(0\)](#) | [Status History \(3\)](#) | [Notes & Attachments \(5+\)](#)

Grants & Apps Detail

Responsibility/Owner	Anand Sethupathy [Change]	Grants & Apps Record Type	General Application [Change]
Project Name	Green Design - Living Green Education Seminars 2009	Request Number	2009-12314
Organization Name	Green Design	Status	Grant Awarded
Docket	November 2009 Docket	Support Type	
Awarded Date	9/24/2009	Final Report Due Date	9/30/2012

Financials

Requested Amount	\$75,000	Total Organizational Budget	
Awarded Amount	\$75,000.00	Total Project Budget	
Paid Amount	\$0	Total Contributions	\$75,000
Payments to be Scheduled	\$0		

Timeframe

Start Date	9/30/2009	Renewal?	<input type="checkbox"/>
End Date	9/30/2010	Renewal Ref. Grant #	
Request Duration (in Months)	36		
Multiyear?	Yes		

Narrative

Grant Purpose

Grants & Apps enable staff to accept or decline grant applications, establish reporting & payment schedules, and report on budgets, objectives and progress.

Related Lists

Grants & Apps: Green Design - Living_

Contact Roles [New](#) [Contact Roles Help](#)

Action	Contact Name	Organization Name	Email	Phone	Role	Primary
Edit Del	Brad Helies	Green Design	brad.helies@npowerny.org	(212) 444-7264		<input type="checkbox"/>

Open Activities [New Task](#) [New Event](#) [Request Review on App](#) [Open Activities Help](#)

No records to display

Activity History [Log A Call](#) [Mail Merge](#) [Send An Email](#) [View All](#) [Activity History Help](#)

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
Edit Del	Email: Grant Application - Where We Are Template	Brad Helies	✓	9/30/2009	Anand Sethupathy	9/30/2009 10:33 PM
Edit Del	Email: Grant Application - Summary and Benchmarks Template	Brad Helies	✓	9/30/2009	Anand Sethupathy	9/30/2009 10:32 PM
Edit Del	Email: Grant Application - Received Template	Brad Helies	✓	9/30/2009	Anand Sethupathy	9/30/2009 10:30 PM
Edit Del	Email: Grant Application - Received Template	Brad Helies	✓	9/30/2009	Anand Sethupathy	9/30/2009 10:27 PM
Edit Del	Email: Grant Application - Missing Items Template	Brad Helies	✓	9/30/2009	Anand Sethupathy	9/30/2009 10:24 PM

[Show more >](#) | [Go to list](#)

Check Requests & Payments [New Payment](#) [Check Requests & Payments Help](#)

Action	Payments ID	For Org	Amount	Status	Scheduled Payment Date	Payment Date
Edit Del	CRP-00103	Green Design	\$25,000		9/30/2009	
Edit Del	CRP-00104	Green Design	\$25,000		9/30/2010	
Edit Del	CRP-00105	Green Design	\$25,000		9/30/2011	

Grantee Reports [New Grantee Reports](#) [Grantee Reports Help](#)

Action	Grantee Reports ID	Final Report?	Status	Due Date	Submission Date	Last Modified By
Edit Del	GR-1101	<input type="checkbox"/>		9/30/2010		Anand Sethupathy , 9/28/2009 10:13 AM
Edit Del	GR-1102	<input type="checkbox"/>		9/30/2011		Anand Sethupathy , 9/28/2009 10:13 AM
Edit Del	GR-1103	<input checked="" type="checkbox"/>		9/30/2012		Anand Sethupathy , 9/28/2009 10:13 AM

Related Lists display records related to the record the user is currently viewing. (ie. organizational contacts or internal funding sources for awarded grants.)

Reporting Engine



EXAMPLE - Grant Summary by Status_

Summarize information by: Status

Time Frame
 Interval: Awarded Date
 Duration: Current and Previous 2 FY
 Start Date: 1/1/2007
 End Date: 12/31/2009

View: All grants & apps
 Grants & Apps Status: Any
 Probability: All

Run Report | Hide Details | Customize | Save | Save As | Delete | Printable View | Export Details

Generated Report:

Filtered By: 1 [Edit](#)

1. Status equals Application Submitted, Application Under Consideration, Grant Awarded

Request Number	Organization Name	Project Name	Awarded Amount	Awarded Date	Total Paid Amount	Final Report Due Date
<input type="checkbox"/> Status: Application Submitted (3 records)						
0800900	NPowerNY	TEST Project	\$100,000.00	1/21/2009	\$0	-
09-000355	Forever Green	Green Arts 09	\$150,000.00	2/15/2009	\$50,000	11/1/2011
09-30509	Excelsior Children's Program	Excelsior Children's Program-	-	3/31/2009	\$0	9/5/2009
<input type="checkbox"/> Status: Application Under Consideration (4 records)						
07-1231546	Acme Org	Acme Org 07 Project	\$150,000.00	9/30/2007	\$0	9/30/2012
08-1231546	Acme Org	Acme Org 08 Project	\$150,000.00	9/30/2009	\$0	9/30/2012
09-1113454	Green Films	Green Films - General Support - 2009-09-30	\$150,000.00	9/30/2009	\$0	9/30/2012
09-1231546	Acme Org	Acme Org 09 Project	\$150,000.00	9/30/2009	\$0	9/30/2012
<input type="checkbox"/> Status: Grant Awarded (16 records)						
07-000355	Forever Green	Green Arts 07	\$150,000.00	4/15/2007	\$0	4/16/2010
07-00033	TNTCDE	TNTCDE - General Support - 2007-05-05	\$235,000.00	5/5/2007	\$0	-
3	NPower NY	NPower NY - TSC Program Expansion	\$375,000.00	10/9/2008	\$0	10/23/2008
000002	Test1	Test1 Foundation - 2008 - General Support	\$250,000.00	11/14/2008	\$0	-

FGM leverages Salesforce.com's native Reporting Engine to provide clean, deep-level, reports through an easy to use point-and-click wizard.

Q4 2009 Release : 501(c)(3) Verification



Search

Search All

Limit to items I own

[Advanced Search...](#)

Recent Items

- [Tax_Status-000067](#)
- [Tax_Status-000071](#)
- [Tax_Status-000072](#)
- [Tax_Status-000074](#)
- [Tax_Status-000073](#)
- [TestLead1](#)
- [Tax_Status-000068](#)
- [Tax_Status-000069](#)
- [Tax_Status-000070](#)
- [Deshpande](#)

[Recycle Bin](#)

Tax Status
Tax_Status-000067

[Printable View](#) | [Customize Page](#) | [Edit Layout](#) | [Help for this Page](#)

[Notes & Attachments \(0\)](#)

Tax Status Detail

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-000067	Verification Data Source	IRS Master Business File
Date of Status Check	10/12/2009	IRS Master Business File Version	9-2-09
Ruling Date (Year)	2001	Ruling Date (Month)	02

Links

Organization Information

Tax ID / E.I.N.	134145441	Address	MEZZANINE
Name	NPOWERNY INC	City	NEW YORK
In Care of Name	% BARBARA CHANG	State	NY
Sort or Secondary Name		Zip Code	11201-0000

Tax Classification

Subsection Code	3	Subsection Classification Description	Charitable Organization
Classification Code	1	Exempt Org Status Code Desc	Unconditional Exemption
Exempt Organization Status Code	1	Deductibility Code Description	Contributions are deductible.
Deductibility Code	1	ITEE Category	Community Improvement, Capacity Building
ITEE Code	S50		

Q4 2009 Release of FGM allows single-click verification of an org against the IRS Master Business File using only the Employer Identification Number.

Q4 2009 Release : Setup Wizards



salesforce.com - Developer Edition

Setup · System Log · Help · Logout

force.com
apps

Grants & Apps

Foundation Grant Manager

[Home](#)
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[Reports](#)
[Dashboards](#)
[Dockets](#)

Setup Payments/Budgets

[Save](#)
[Previous](#)
[Return to Grant/App](#)

Total Amount \$75,000.00

Payment #	Amount	Date	Contributing Program	Name	Amount
1	25,000	9/30/2009 [10/19/2009]			
			9/30/2009 [10/19/2009]	Environment	12,500
			9/30/2009 [10/19/2009]	Education	12,500
2	25,000	9/30/2010 [10/19/2009]			
			9/30/2010 [10/19/2009]	Education	12,500
			9/30/2010 [10/19/2009]	Environment	12,500
3	25,000	9/30/2011 [10/19/2009]			
			9/30/2011 [10/19/2009]	Environment	12,500
			9/30/2011 [10/19/2009]	Education	12,500

[Save](#)
[Previous](#)
[Return to Grant/App](#)

Q4 2009 Release of FGM provides Setup Wizards that allow users to quickly and efficiently set up payments, grantee reports and associated objectives for awarded grants. Scheduling payments that draw from multiple founding sources for your organization, and associating grant objectives and scheduled report dates, is easily accomplished.



PhilanTrack™ Online Grants Management System

October 2009 **ICAL**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Alerts

- 07/01/2009 Arts After School submitted [Interim Grant Report](#)
- 09/30/2009 [Joyce Teller Proposal Past Due](#)

To Do List [Add »](#)

View LOI

LOI: **Arts - Arts After School**

Invite full proposal
 Decline LOI. Please enter reason for declining LOI:

Download: **PDF**

 No attachments

LOI Info

Prospective Grantee	Arts After School	Funding Area	Arts
Grant Type	General/operating support	Due Date	09/04/2008
Status	Received	Submitted	08/28/2008
Grant Title	General Support	Grant Amount	150,000.00
Purpose	for general support of our programs		

Notes (private)

LOI contact

Main artist: Emerson Palmer
 Email Address: arts@arts.com

Grantee contact

Executive Director: Linda Jackson
 Email Address: linda@philantech.com

Support for Multi-stage Application Process
 (e.g., Letter of Inquiry to full proposal)

October 2009 **ICAL**

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Alerts

- 07/01/2009 Arts After School submitted [Interim Grant Report](#)
- 09/30/2009 [Joyce Teller Proposal Past Due](#)

To Do List [Add »](#)

View Individual

Grantee:

View:

Joe Johnson [Edit »](#)

Website:
Address: 123 Main Street
City: Annapolis
State/Province: MD
Zip/Postal: 20853
Country: UNITED STATES
Status: Prospective

Contact Information [Edit »](#)

Name: Joe Johnson
Email Address: joe@philantech.com
Phone Number: 301-817-4995
Fax:

Payee [Edit »](#)

Name: University of Maryland
EIN: 52--1916318
Address: 16409 BOND MILL RD
City: Laurel
State/Province: MD
Zip/Postal Code: 20707-2848
Country: UNITED STATES

Notes

[Edit »](#)

Grants to Individuals
(scholarships, fellowships)

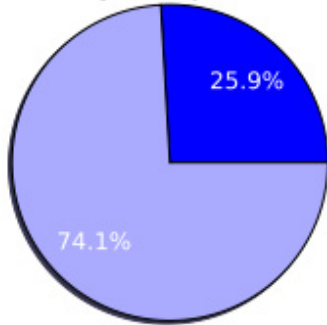
Payee

[Edit »](#)

Name:	University of Maryland
EIN:	52--1916318
Address:	16409 BOND MILL RD
City:	Laurel
State/Province:	MD
Zip/Postal Code:	20707-2848
Country:	UNITED STATES

Support for Fiscal Sponsors / Payees other than Grant Recipient

Funding Diversity - Overview

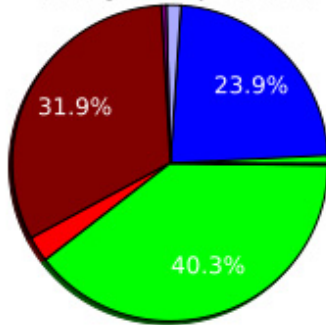


[Enlarge and view details](#)

[Export to Spreadsheet](#)

Source	Amount	Pct
Total Receipts	1,180,071.00	25.9%
Total Program Service Revenue	3,373,218.00	74.1%

Funding Diversity - Detailed



[Enlarge and view details](#)

[Export to Spreadsheet](#)

Source	Amount	Pct
Individual Contributions	1,089,134.00	23.9%
In-Kind Contributions/Donations	67,082.00	1.5%
Special Events Revenue	23,855.00	0.5%
Rental Income	1,454,509.00	31.9%
Dividend and Interest Income	120,428.00	2.6%
Realized Gain/(Loss) on Investments	1,834,113.00	40.3%
Gain/(Loss) on Sale of Other Assets	(46,718.00)	-1.0%
Other Receipts	10,886.00	0.2%

Extended Financial Analysis Tool
to draw from submitted proposals in addition to
submitted reports

Grant Documents

Grant Documents add documents					
File name	Summary	Size	Datetime added	Added By	Action
Grant Agreement.doc	Grant Agreement	25 KB	2009-02-12	Tim Smythe	Edit Delete
Site Visit Notes.doc	Site Visit Notes	25 KB	2009-02-12	Tim Smythe	Edit Delete

Enhanced Document Management for Awarded Grants

Edit a Funding Cycle

Funding Area:

Funding Cycle Name: Start date: End date:

Text to display to user when funding cycle is closed:

Proposals Accepted: Proposal Template: [View Template](#)

Note: by default, PhilanTrack can always be used to solicit proposals from selected grantee organizations. To accept unsolicited proposals, complete information below.

Eligibility Quiz: Eligibility Template: [View Template](#)

Letter of Inquiry: Letter of Inquiry Template: [View Template](#)

Enhanced Funding Cycle Management

(e.g., automatically closing a funding cycle to new applicants when deadline is reached; automatically opening for next round)



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

<http://www.iaa.com>