

# What's New in Grants Management Software and Services

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# Major Trends in 2009 - 2010

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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

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- Table containing key vendor provided information
- Screenshots of major new and enhanced features from 2009 and 2010
- Examples from multiple products and services

## Grants Management Software and Service Providers

Vendor (Year of first grant software or service)	Active GM Clients as of 9/1/09	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2009 (In multiple client production use as of 9/1/2009)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
<b>Altum</b> (1998)  877-GO-ALTUM 703-657-8299 <a href="http://www.altum.com">www.altum.com</a> <a href="mailto:info@altum.com">info@altum.com</a>  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"> <li>Easygrants®                             <ul style="list-style-type: none"> <li>Program Planning &amp; Management</li> <li>Application</li> <li>Review (internal and/or external; individual &amp; committee/panel)</li> <li>Grantee Financial and Progress Reporting</li> <li>Grants Management</li> <li>Contact Management</li> <li>Workflow Configuration</li> <li>Integrated Document Management (SharePoint)</li> <li>Queries &amp; Reports</li> </ul> </li> <li>proposalCENTRAL®                             <ul style="list-style-type: none"> <li>Application</li> <li>Review</li> <li>Progress Reports</li> <li>Grants Management</li> <li>Contact Management</li> <li>Queries &amp; Reports</li> </ul> </li> <li>Altum Query Module ®</li> <li>Altum Financial Management and Costing Applications (based on Infor Performance Management)</li> </ul>	<ul style="list-style-type: none"> <li>Easygrants                             <ul style="list-style-type: none"> <li>Program management</li> <li>Outcomes logic framework</li> <li>Workflow &amp; task builder</li> <li>PDF builder</li> <li>Screen label manager</li> <li>SharePoint integration (document management)</li> <li>High throughput performance enhancements</li> <li>Security management</li> <li>508 accessibility compliance</li> </ul> </li> <li>proposalCENTRAL                             <ul style="list-style-type: none"> <li>New module: outcome/impact tracking &amp; program logic framework</li> <li>Extensive modifications to support online</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Word</li> <li>Microsoft Excel</li> <li>Microsoft Outlook</li> <li>Microsoft SharePoint</li> <li>Report Writers and Business Intelligence Software (e.g., Crystal, Cognos)</li> <li>Custom links to accounting systems</li> <li>Custom links to compliance verification service(s)</li> <li>Custom links to CRM systems, internal authentication</li> </ul>	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

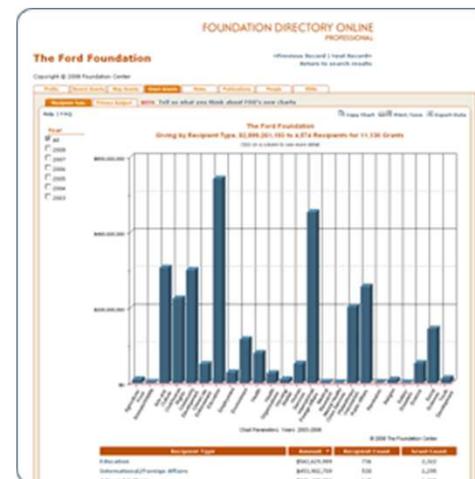
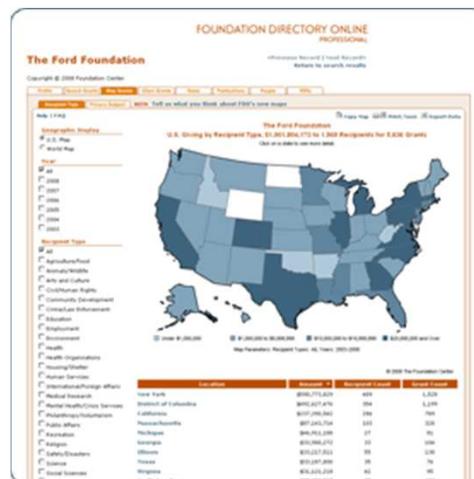
Vendor (Year of first grant software or service)	Active GM Clients as of 9/1/09	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2008-2009 (In multiple client production use as of 9/1/2009)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
<b>Bromelkamp Company LLC</b> (1979)  888-290-9087 <a href="http://www.bromelkamp.com">www.bromelkamp.com</a> <a href="mailto:info@bromelkamp.com">info@bromelkamp.com</a>  106 East 24th Street Minneapolis, MN 55404-3522	220 clients  2 Intl.	14 staff	Community foundations Corporate foundations Family foundations Operating foundations Private foundations Government grantmaking agencies	<ul style="list-style-type: none"> <li>First Pearl (grants, CRM)</li> <li>Corporate Pearl (grants, CRM, matching gifts, dollars for doers, event tracking)</li> <li>Community Pearl (grants, CRM, fund accounting, fundraising)</li> <li>eGrant.net (online grants application management tool)                             <ul style="list-style-type: none"> <li>online applications and reporting</li> <li>scholarship applications</li> <li>online review</li> <li>Application Status</li> </ul> </li> <li>Pearl Companions                             <ul style="list-style-type: none"> <li>Pearl Geocoder</li> <li>Pearl NCOA (National Change of Address database)</li> <li>Pearl ACH (direct deposit of grants and/or donor pledges)</li> <li>Pearl Outlook Updater</li> <li>Scan to Chronicle</li> <li>Pearl Web Collector/Reporter</li> <li>Bridge to QuickBooks or Peachtree accounting</li> </ul> </li> <li>Pearl Loan Servicing (for PRIs)</li> <li>Pearl (custom)</li> </ul>	<ul style="list-style-type: none"> <li>eGrant.net                             <ul style="list-style-type: none"> <li>advanced calculations</li> <li>improved validation checks</li> </ul> </li> <li>Pearl                             <ul style="list-style-type: none"> <li>Enhanced document management</li> <li>Enhanced unattended email correspondence</li> <li>Automatic document storage</li> <li>Enhanced GuideStar integration with automatic Charity Check recordkeeping</li> <li>Grants/gifts payable automation</li> <li>Integrated document scanning</li> <li>Streamlined fund accounting interface</li> <li>More powerful and flexible joint investment allotment and fund fees assessment</li> <li>Workflow processing agent</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Word</li> <li>Microsoft Excel</li> <li>Microsoft Outlook</li> <li>GuideStar</li> <li>MapQuest</li> <li>Google</li> <li>ChoicePoint</li> <li>Bridger Insight for compliance verification</li> <li>QuickBooks</li> <li>Citrix MetaFrame</li> <li>FIMS import from eGrant.net</li> <li>Peachtree</li> </ul>	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/>

- Nearly 100,000 grantmaker Foundation Directory Online (FDO) and Philanthropy Insight profiles
- Over 3,700 company profiles
- Over 1.9 million grant descriptions
- 650,000 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](mailto: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

**500+**  
**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

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**Carnegie Corporation of New York**

«Previous Record | Next Record»  
Return to search results

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[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

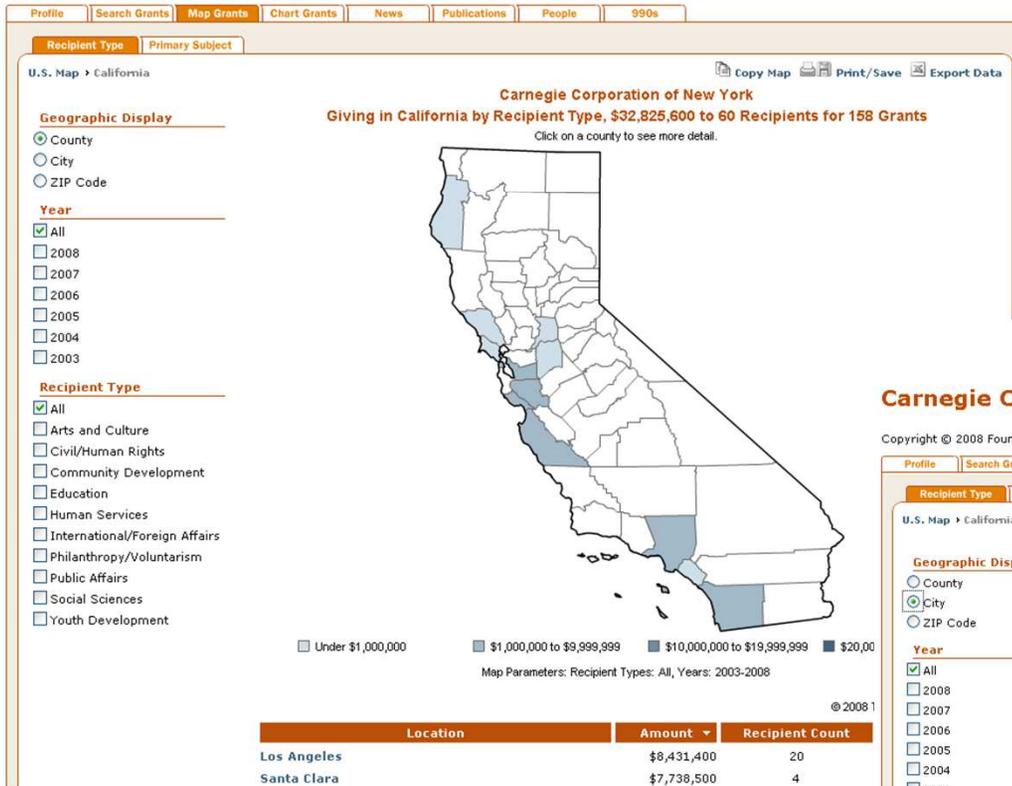
© 2008 The Foundation Center

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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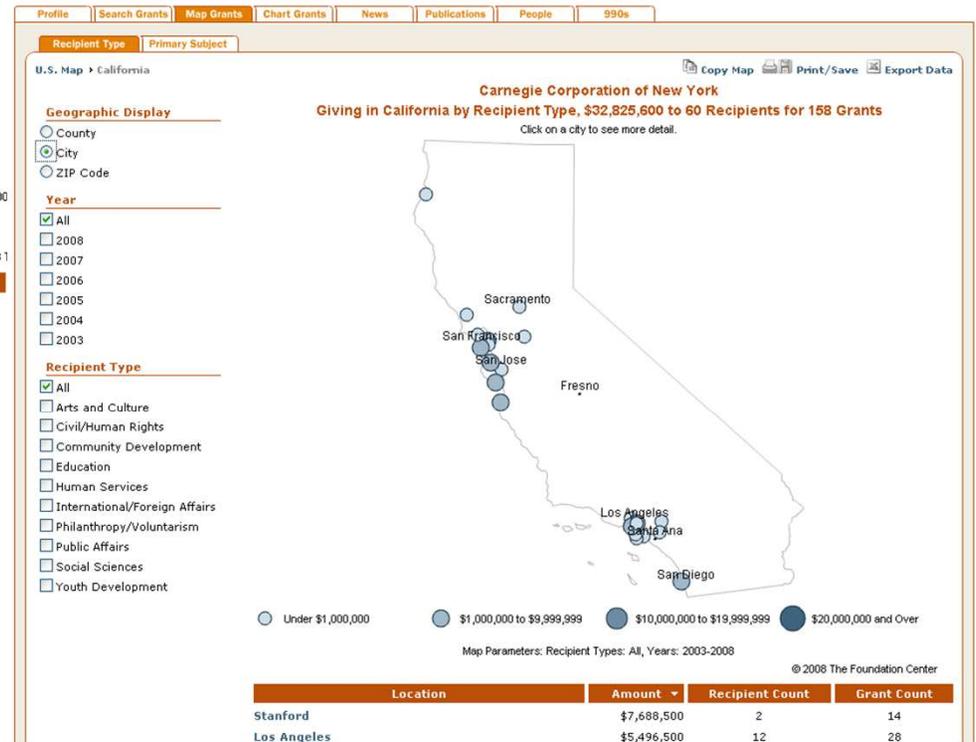
← County display

City display →

Carnegie Corporation of New York

«Previous Record | Next Record»  
Return to search results

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U.S. Map > California > Los Angeles

## 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

#### Grant Details

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

Enter a city, address, etc.

[Zoom To](#)

[Grantmaker Map](#)

[Create/Edit](#)

[Grant Map](#)

[Create/Edit](#)

[Tell us what you think »](#)

**PLOT MAP PINS**

Grantmakers

**DISPLAY AGGREGATED GRANTMAKER DATA**

Indicators:

None

**DISPLAY U.S. THEMATIC DATA**

Indicators:

- None
- American Human Development Indices™
- Education
- Income
- Population
- Environment
- Housing
- Socio-economic
- Health

**GRANTMAKER FILTERS**

Fields of Interest:

- All
- Arts and Culture
- Education
- Environment
- Animals/Wildlife
- Health
- Mental Health/Crisis Services
- Health Organizations

Grantmaker Type:

- Independent Foundation
- Company-Sponsored Foundation
- Community Foundation
- Public Charity
- All

Total Assets:

No Minimum to No Maximum

Total Giving:

No Minimum to No Maximum

Establishment Year:

No Minimum to No Maximum

[Cancel](#)

[Clear Map](#)

[Create/Refresh Map](#)

**About this Map**

**Current Parameters**

Geographic Display: State  
Grantmaker Indicator: None  
Thematic Indicator: None  
Grantmaker Name: None

[Print/Save Map](#)

[Copy Map](#)

See the [About](#) section and the [User Manual](#) for information on the source of data in *Philanthropy In/Sight*.



Asia

Zoom To

Grantmaker Map

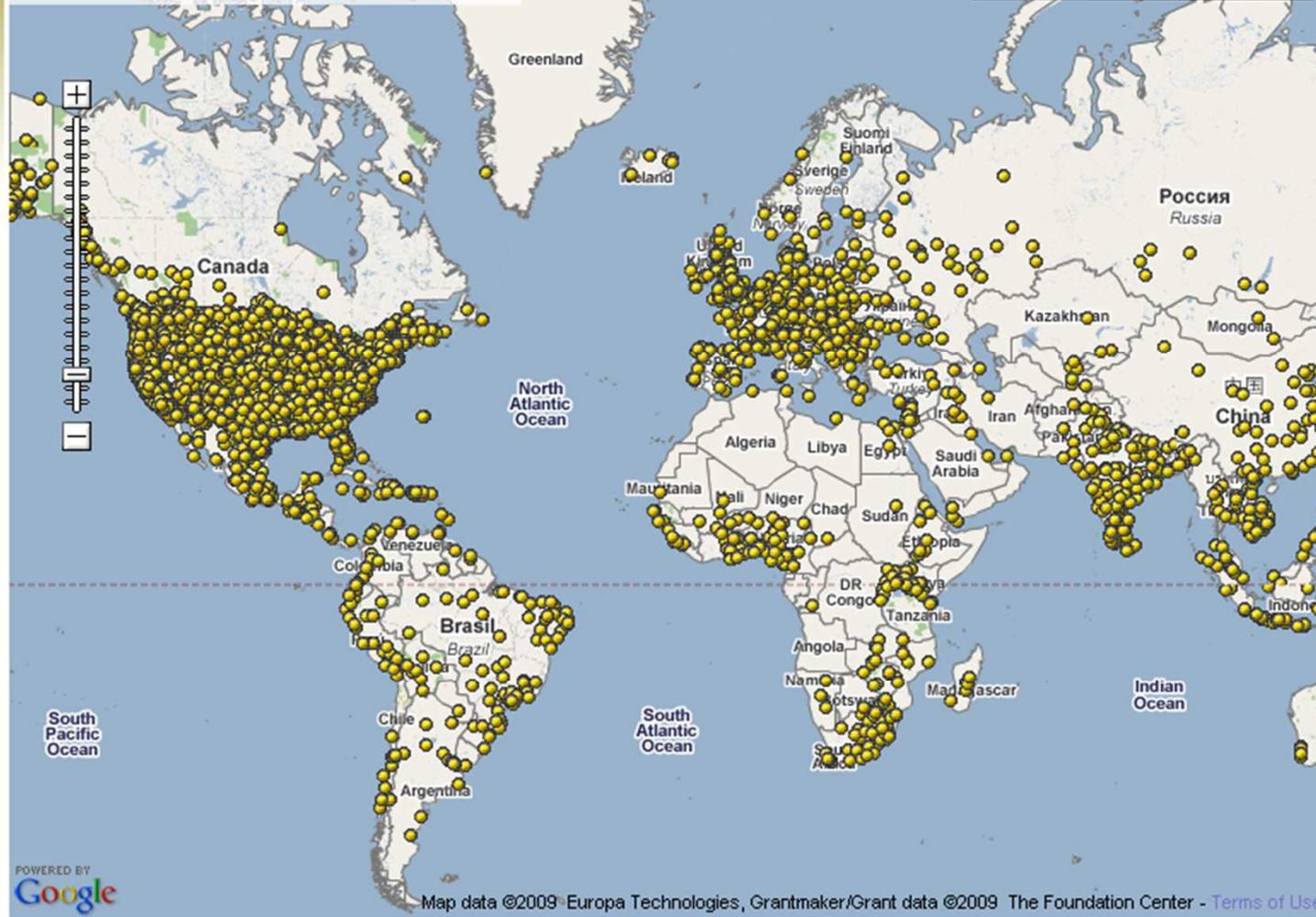
Edit

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

Zoom To

Grantmaker Map

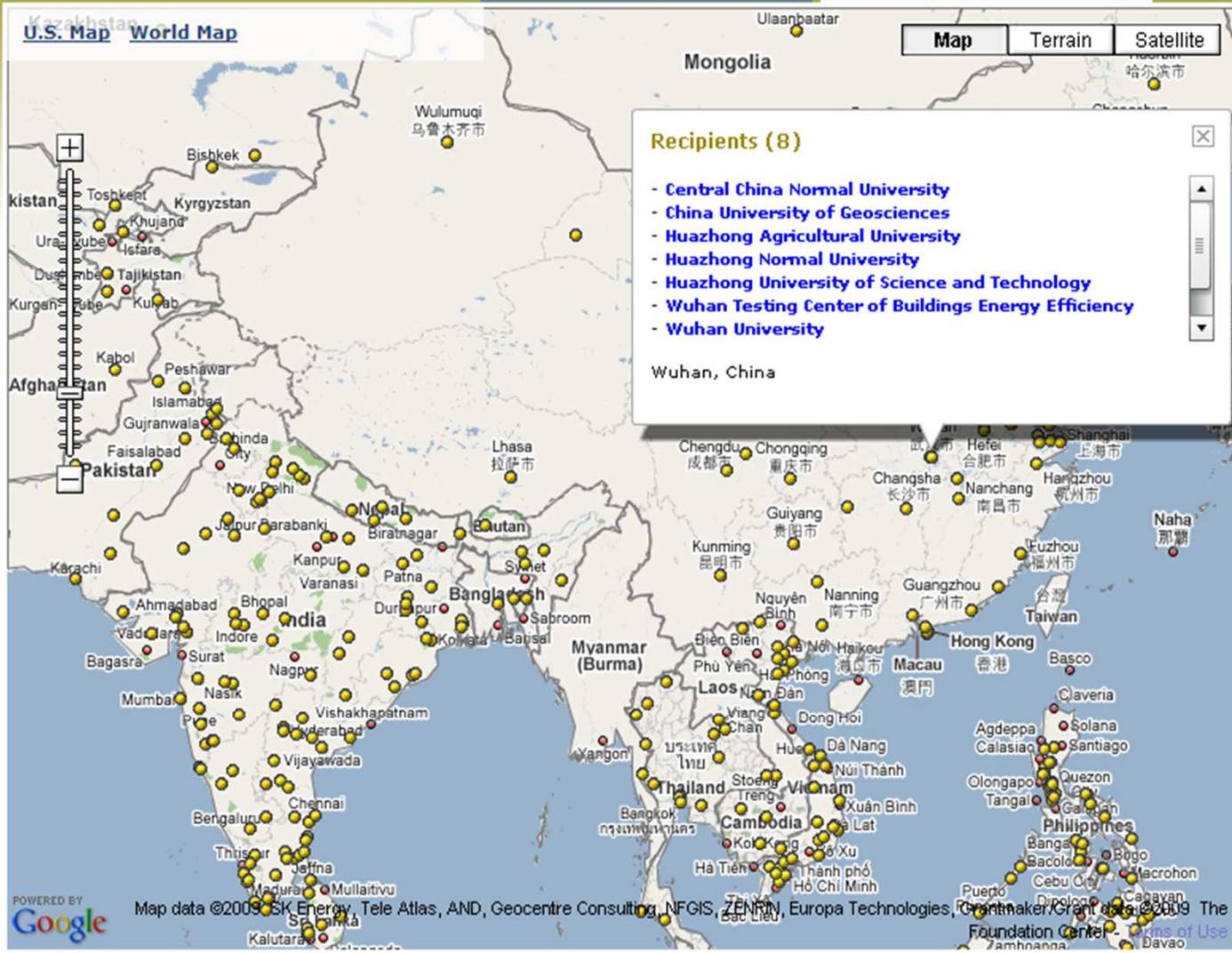


Grant Map



U.S. Map World Map

Map Terrain Satellite



### 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](#)



Map data ©2009 SK Energy, Tele Atlas, AND, Geocentre Consulting, NFGIS, ZENRIN, Europa Technologies, Grantmaker Grant data ©2009 The Foundation Center

[Terms of Use](#)

## 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](mailto:energyfund@ef.org)  
URL: [www.ef.org](http://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
<a href="#">20/20 Vision Education Fund</a>	Silver Spring	MD	1
<a href="#">Alliance for Affordable Energy</a>	New Orleans	LA	3
<a href="#">Alliance for Clean Energy New York</a>	Albany	NY	1
<a href="#">Alliance for Sustainability</a>	Minneapolis	MN	1
<a href="#">Alliance to Save Energy</a>	Washington	DC	16
<a href="#">American Coalition for Ethanol</a>	Sioux Falls	SD	1
<a href="#">American Corn Growers Foundation</a>	Washington	DC	3
<a href="#">American Council for an Energy-Efficient Economy</a>	Washington	DC	50
<a href="#">American Fund for Charities</a>	Washington	DC	1



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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 top navigation bar includes tabs for Grant Details, Activity, Contacts, Financials, Demographics, and Documents. The Documents tab is selected. Below the navigation bar, there is a summary section for a grant with details such as Grant ID, Grantee Organization, Status, and Funding Opportunity. A table of submitted documents is displayed, with columns for Description, Submitted Date, Submitted By, File Name, and Options. A callout box points to the Documents tab, stating: "All grant documents are stored and accessible in the Grant File under 'Documents.'" Another callout box points to the document list, stating: "Rather than storing these documents in the database or file system, Easygrants stores them in Sharepoint." The bottom right of the image shows a SharePoint interface for "GMS Sales & Marketing" with a "Shared Documents" library containing two documents: "198\_Letter of Award - Short" and "198\_Letter of Award - Short".

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	
	10/19/2007	McKee, James	James_p_mckee_bio_ALTUM 09242007.DOC	
	11/19/2007	McKee, James	Budget and Justification Temp 03312005.doc	
	11/19/2007	McKee, James	James_p_mckee_bio_ALTUM 09242007.DOC	
	11/19/2007	McKee, James	Proposal for Cross Industry P Evaluation 09132007.doc	

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

The image displays three overlapping screenshots of the SharePoint interface for 'Altum, Inc. | GMS Sales & Marketing'. 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 with the text: 'Easygrants creates folders for each grant program.' Another callout points to the search bar with the text: 'Documents are indexed for full text searching.' The middle screenshot shows a sub-library '2\_Efficacy and Evaluation Mechanism' containing two documents: '198\_Letter of Award - Short! NEW'. A callout box points to this library with the text: 'And stores all grant documents in a folder for that grant.' The bottom screenshot shows the 'Version History' for the document '198\_Letter of Award - Short.docx'. A callout box points to this view with the text: 'And track the version history of each document.'

Altum, Inc. | GMS Sales & Marketing

Altum, Inc. > Sites > GMS Sales & Marketing > Shared Documents > Easygrants\_Demo\_6.0 > Grants

**Shared Documents**

Share a document with the team by adding it to this document library.

Type	Name	Modified	Modified By	Checked Out To
Folder	1_Health Technology Assessment	7/22/2009 4:13 PM	Altum 1	
Folder	2_Efficacy and Evaluation Mechanism	7/22/2009 4:23 PM	Altum 1	

Altum, Inc. | GMS Sales & Marketing

Altum, Inc. > Sites > GMS Sales & Marketing > Shared Documents > Easygrants\_Demo\_6.0 > Grants > 2\_Efficacy and Evaluation Mechanism > Standard > 2\_EME - Standard > 39\_Easygrants ID

**Shared Documents**

Type	Name	Modified	Modified By	Checked Out To
Document	198_Letter of Award - Short! NEW	10/8/2009 11:42 AM	Altum 1	
Document	198_Letter of Award - Short! NEW	10/8/2009 11:42 AM	Altum 1	

Altum, Inc. | GMS Sales & Marketing

Altum, Inc. > Sites > GMS Sales & Marketing > Shared Documents > Easygrants\_Demo\_6.0 > Grants > 2\_Efficacy and Evaluation Mechanism > Standard > 2\_EME - Standard > 39\_Easygrants ID > 5\_EMES > 2\_EMES > 39\_EGID

**198\_Letter of Award - Short > Version History**

Versions saved for 198\_Letter of Award - Short.docx

All versions of this document are listed below with the new value of any changed properties.

Delete All Versions

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 breadcrumb "Create Letter of Award - Altum Admin". The form is divided into several sections:

- Instructions**: A section for providing instructions.
- Grant Information**: A table with the following data:

Easygrants ID	39	Grant Status	Active
Primary Contact/PI	Swaney, Scott	Organisation Name	Southampton University Hospitals
Award Amount	\$247,860.00	Award Date	07/01/2009
Primary Staff Contact	McKee, David		
Project Title	The Effects of Maintenance Schedules following Pulmonary Rehabilitation in Patients with Chronic Obstructive Pulmonary Disease		
- Summary Documents**: A section indicating "No Summary Documents for this Grant".
- Create Agreement**: A section with a dropdown menu for "<Select Agreement Type>" and a "Go" button.
- Upload Details**: A table showing document uploads:

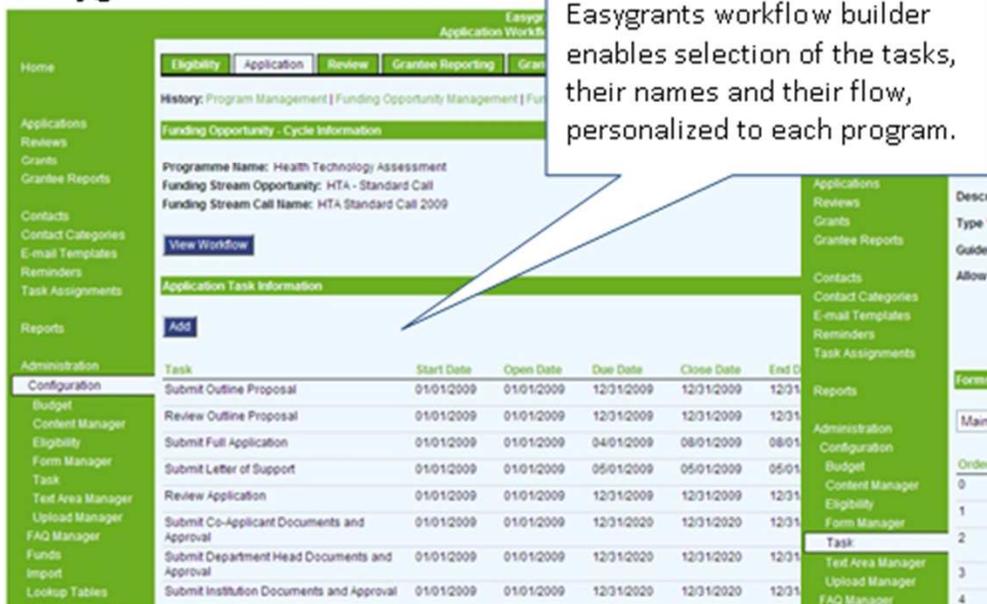
File/Document Name	Uploaded By	Uploaded Date
Letter of Award - Short.docx	McKee, David	10/8/2009

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

The screenshot shows a SharePoint "My Site" for Jamie McKee. The page includes a navigation sidebar on the left with options like "My Profile", "Details", "Links", "Colleagues", "Memberships", "Sites", "Program Evaluation", "Project Site", "Blog", "Documents", "Personal Documents", "Shared Documents", "Links", "Discussions", "Surveys", "Pictures", and "Recycle Bin". The main content area displays "SharePoint Sites" (My Site, Easygrants Product Management), "Documents" (James P McKee Altum Resume, james in track attire), "Tasks", and an "RSS Viewer" for "Tactical Philanthropy". The RSS viewer shows several articles with titles like "2009 America's Giving Challenge Encourages Individuals to Promote or Donate to their Favorite Causes" and "George Overhiser of AFP Capital Partners (a division of the nonprofit Finance Fund) is one of the smartest people in philanthropy".

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

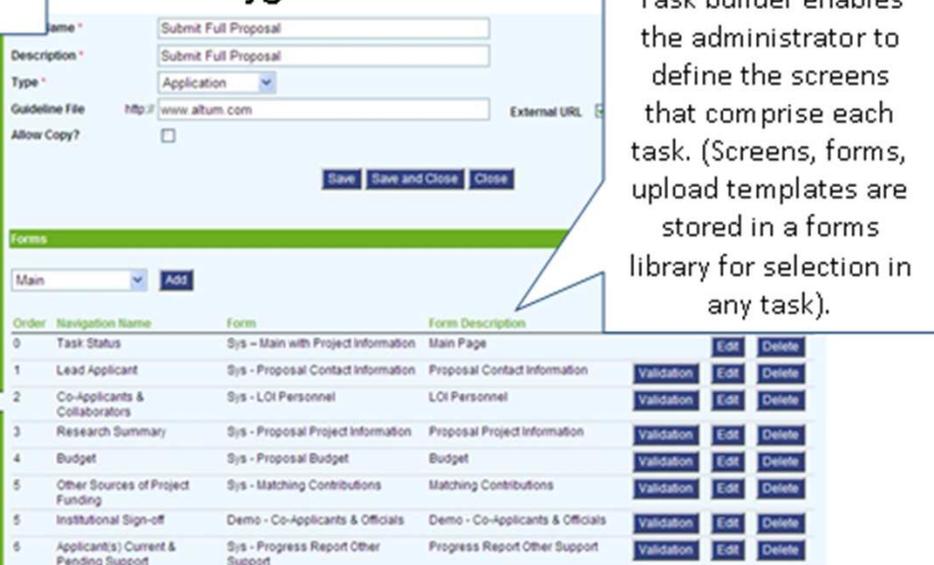
### Easygrants Workflow Builder



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	Options
0	Task Status	Sys - Main with Project Information	Main Page	Validation Edit Delete
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	
<b>Weighted Score (0 - 50)</b>	41.00	
<b>Percentile</b>	0%	

Recommended Amount: 2000.00

Save Cancel

Application Attachments Other Comments

1 / 2 92.9% Find



2009-2010 Grant Application

Application ID:

# Review Cover

Add New Review Group

Show Review Groups

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

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	<a href="#">Remove</a>	4 Square Quartet [Me]	0.00
52356	<a href="#">Remove</a>	Bromelkamp Company [Matt]	13.00
50396	<a href="#">Remove</a>	Pathways for Children [Melinda Jennis]	37.00
50568	<a href="#">Remove</a>	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



eGrant.net is a product of **Bromelkamp Company, LLC**.  
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  
ServiceAreaDe  
Mission: Fou em

Content:     
Note:

**All Contacts fo**

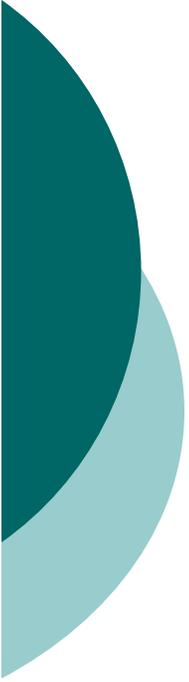
Num	Email
5016	Maye^Patrice

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.

*Donor may select suggested grantee from his recommendation history*

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

*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"/>
<a href="#">Show Details</a>	Find	

*Donor may find a grantee in the charitable catalog*

<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Show Details</a>	Find	

*Spotlighted funding opportunity matches donors charitable interests*

<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Show Details</a>	Find	

<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Show Details</a>	Find	

<input type="text"/>	<input type="text"/>	<input type="text"/>
<a href="#">Show Details</a>	Find	

### 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

# Grant Recommendation Worksheet

**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..."/>  Or, update this file using the following alternate method: <input type="radio"/> Fax <input type="radio"/> Mail <input type="radio"/> Not required for our organization <input type="radio"/> Use the following URL: <input type="text"/>
IRS Letter	09/25/2009		09/24/2010	pending	Upload Your File: <input type="text"/> <input type="button" value="Browse..."/>

**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.

**Due Diligence Documents**  
*( Foundation Control Panel )*

Name	Status	File Type	Creation Date	Queue Date	Approval Date	Expiration Date	ID
<a href="#">990_Oakwood_Community_Foundation_2008.doc</a>	approved	990	Sep 25, 2009		Sep 25, 2009	2010-09-24	Delete
<a href="#">IRS_Status_Oakwood_Community_Foundation.doc</a>	pending	IRS Letter	Sep 25, 2009			2010-09-24	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:

Online Grant Review Screen 1

Proposal dashboard helps the reviewer to manage assigned reviews

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	<a href="#">09/10/2009</a>
Default Worksheet	2007 Neighborhood Technology Grant Program	Project Connect	Scranton Road Ministries CommunityDevelopment Corporation	Submitted	<a href="#">09/28/2009</a>
Default Worksheet	2007 Neighborhood Technology Grant Program	Community Computer Access Program	Fatima Family Center	Submitted	<a href="#">Review Now &gt;&gt;</a>
Default Worksheet	2007 Neighborhood Technology Grant Program	Senior Computer Community Center	Ashbury Community Services, Inc.	Submitted	<a href="#">Review Now &gt;&gt;</a>
Default Worksheet	2007 Neighborhood Technology Grant Program	Technical & Instructional Support for the Neighborhood Computer Center	Thea Bowman Center	Submitted	<a href="#">Review Now &gt;&gt;</a>

Page: 1/4

# Grant Review - 1

## William Gruber's "Default Worksheet" Worksheet

[Back to Review Proposals](#)

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](#)

Reviewers can optionally see prior reviews

Links to organization profile and budget

Complete proposal with all questions and responses

LOI responses included in full proposal review

Standardize evaluations with ranking questions

Multiple rounds, so entire review is done online

### Questions

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

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

### LOI

Project Name  
Community Computer Access Program  
\$20,000.00

### 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.

### 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.

### 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.

## 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**   
**Approach** 3.50  
**Feasibility** Good  
**Sustainability** 

**Overall Application Score**

**13.2 / 16.0**

**My Application Score**

**14.0 / 16.0**

**My Ratings**

**Significance**  
  
**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	<a href="#">run</a>
Application Detail List	Applications with associated Rating Summary and Comments	<a href="#">run</a>
System User List	System User information with assigned Queues and Roles	<a href="#">run</a>
Application Queue Assignment	Application Queues with Assigned Reviewers	<a href="#">run</a>
Application Review Status	Applications and Assigned Reviewers with Review Status	<a href="#">run</a>
Application Reviewer Matrix	Applications and Reviewer Scores Matrix	<a href="#">run</a>

### Memorized Reports

Report Type	Name	Description	
Application List	Minnesota Over \$10		<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>
Application Detail List	Business Office Report		<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>
	App Board Report	description	<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>
Application List	compliance		<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>
Application Detail List	Quarterly Individuals served report		<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>
	Another new report that i created		<a href="#">run</a> <a href="#">edit</a> <a href="#">delete</a>

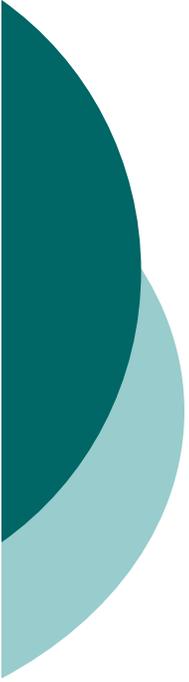
# Custom Reporting



---

## 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*

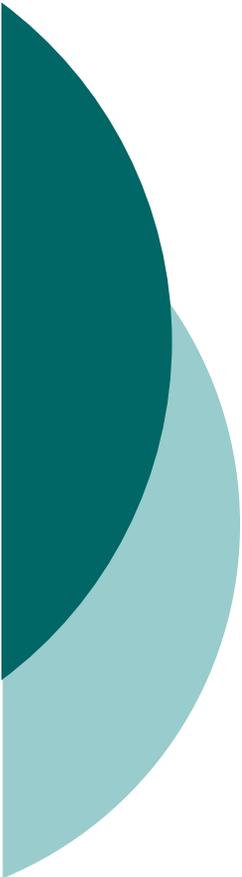


# “Some of the Technical Enhancements”

*(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



**FOUNDANT**  
technologies

---

# 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\* Grants ?

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

Process +

Export

# 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

### 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.

### Organization Contacts ⌵

NAME	TITLE	EMAIL	PHONE NUMBER
<a href="#">Jane Director</a>	Executive Director	<a href="mailto:janedirector@foundant.com">janedirector@foundant.com</a>	406-509-0985
<a href="#">John Applicant</a>	Program Officer	<a href="mailto:john@foundant.com">john@foundant.com</a>	406-509-0987

### Organization Application and Grant History ⌵

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

### Organization Comments ⌵

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	<a href="#">BGCA2005Audit.doc</a>	<a href="#">Delete</a>

# 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
<a href="#">Jane Director</a>	Executive Director	<a href="mailto:janedirector@foundant.com">janedirector@foundant.com</a>	406-509-0985
<a href="#">John Applicant</a>	Program Officer	<a href="mailto:john@foundant.com">john@foundant.com</a>	406-509-0987

Add Contact

**Organization Application and Grant History**

DATE	PROJECT NAME	TYPE OF GRANT	STATUS	GRANT AMOUNT PAID	AMOUNT
7/8/2009	<a href="#">Montana School Visits</a>	One Time	Follow Up Complete	\$25,000.00	\$0.00
7/15/2009	<a href="#">Funding of New Exhibit</a>	N/A	Evaluations Closed	\$0.00	\$0.00
8/5/2009	<a href="#">THE LIVING HISTORY FARM</a>	One Time	Follow Up Submitted	\$2,500.00	\$0.00
8/11/2009	<a href="#">Community Support</a>	Installment	Granted	\$50,000.00	\$0.00
9/18/2009	<a href="#">2010 Capital Campaign</a>	N/A	Application Draft	\$0.00	\$0.00
10/5/2009	<a href="#">2010 Fund</a>	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	<a href="#">BGCA2005Audit.doc</a> <a href="#">Delete</a>

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\***  ?  [1 MB(s) allowed]  
 [File Upload Status: No file uploaded.]

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

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

# Knowledgebase Directly Integrated to Software

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

NAME	TITLE
<a href="#">Jane Director</a>	Executive Director
<a href="#">John Applicant</a>	Program Officer

39 Answers Available

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

# 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

**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

**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 752226081
-  [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

By Date Range: From: 01/01/2009 To: 10/13/2009  
 By Years: From: 2009 To: 2009  
 By Relevance: 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:**

<b>Header</b>	XYZ Foundation	<b>Report Format</b>	HTML
<b>Title</b>		<b>Page Size &amp; Orientation</b>	US Letter
<b>Footer</b>	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.

WYSIWYG editor interface showing a grant letter draft. The toolbar includes options for Edit, Insert, Format, Paragraph, Tools, and View. The text in the editor reads:

**Bowman Foundation**

October 13, 2009

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

Dear Sir or Madam:

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.

Details						Notes						Correspondence						Attachments						Contacts						Grants					
Author	Date	Note												Actions																					
Grants Administrator	03/15/2009	<b>Attached article</b> 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	<b>Overall Impressions</b> 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	<b>Breeding Dependency</b> 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	<b>I see your point, but...</b> 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	<b>I've just added some notes that you should review</b> 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	<b>* Follow-up</b> 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.



Learn more about our  
new Charity Reports

## Notes



# Foundation Source Developments for 4Q 2009 and 2010

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- 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

The screenshot displays the 'GrantedGE - [Reports]' application window. The left sidebar contains a navigation menu with items: Home, Records, Query, Reports, Batch, Grants, Scholarships, Proposals, Admin, Config, and Plugins. The main content area is titled 'Reports' and shows a toolbar with 'New', 'Edit', 'Run', 'Delete', 'Report Builder', 'Report View', and 'Admin View'. The 'Report View' and 'Admin View' buttons are highlighted with a red box. Below the toolbar, there are tabs for 'Contents' and 'Properties', and a search bar. The main area lists various report categories such as 'Main Batch Reports', 'Main Fund Reports', 'Main Grant Reports', 'Main Proposal Reports', 'Main Scholarship Reports', 'Misc Reports', and 'Sample User Reports'. Two callout boxes provide additional information: one pointing to the 'Report Builder' button and another pointing to the 'Report View' and 'Admin View' buttons.

**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: 0

Number Of Awards Per Year: 0 RFPs Awarded: 0

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

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

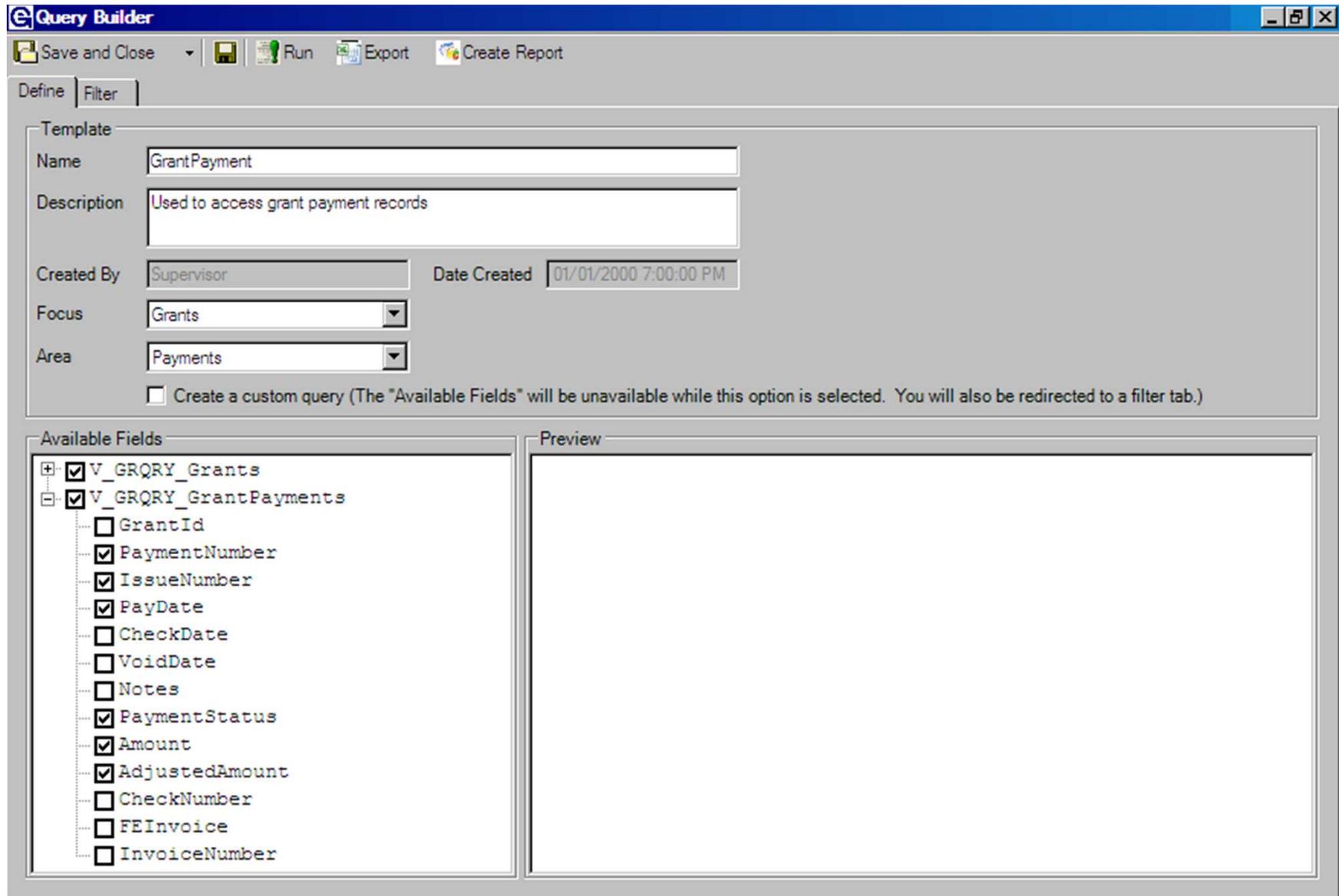
Manager:

Profile Summary	
Detail	Value
RFP Text	
RFP Number	

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

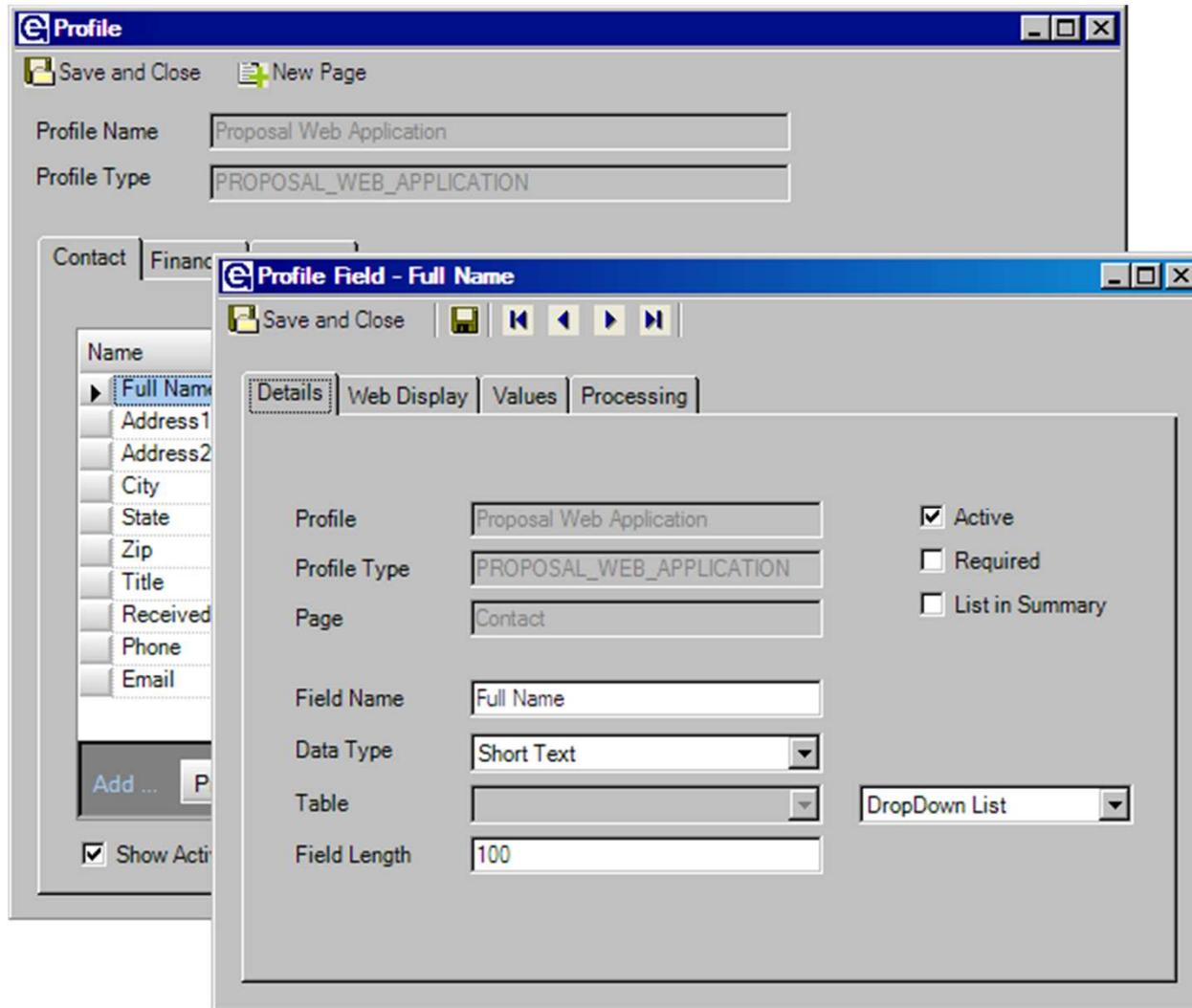
Funds: 0 Proposals: 0

**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 | [Icons]

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

ID [ ] Name [ ] SSN XXX-XX-XXXX Status ACTIVE

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

[Add New Contribution](#) [ ]

Contribution Year [ ]

Other Grants \$ 0.00 +

Parent Contributions \$ 0.00 +

Job Earnings \$ 0.00 +

Other \$ 0.00 +

EFC \$ 0.00

Required Amount Calculation

Preferred Institution [ ]

Required Budget \$ 0.00

RequiredAmount \$ 0.00

---

**New Institution**

Save and Close | [Icons]

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 \$ 0.00 +

Tuition \$ 0.00 +

Yearly Budget \$ 0.00

## New 'Budget' Functionality

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

## Config

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

The screenshot shows a software configuration interface. On the left is a navigation menu with links to 'Tables', 'Business R', 'Global Setti', 'Workflow', 'Characteris', 'Profiles', 'Alerts', and 'Banks'. The main area displays a window titled 'Banks' with a 'Close' button and the text 'Sync Banks with Finance System'. Below this is a table with a single column labeled 'BankId' containing the values 1, 2, and 3. A second window titled 'Bank' is open, showing a 'Save and Close' button and a 'Check Run Config' dialog box. The dialog box has two tabs: 'Details' and 'Check Run Config'. The 'Check Run Config' tab is active and contains three sections of options:

- 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

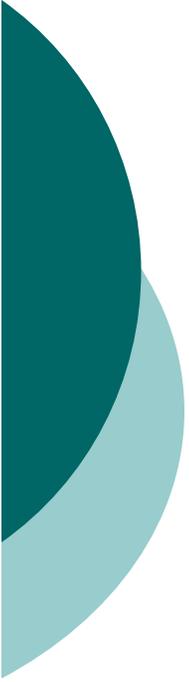
**New Bank Configuration Features**  
allow users to define the financial integration and processing of grants based on individual bank preferences



# 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

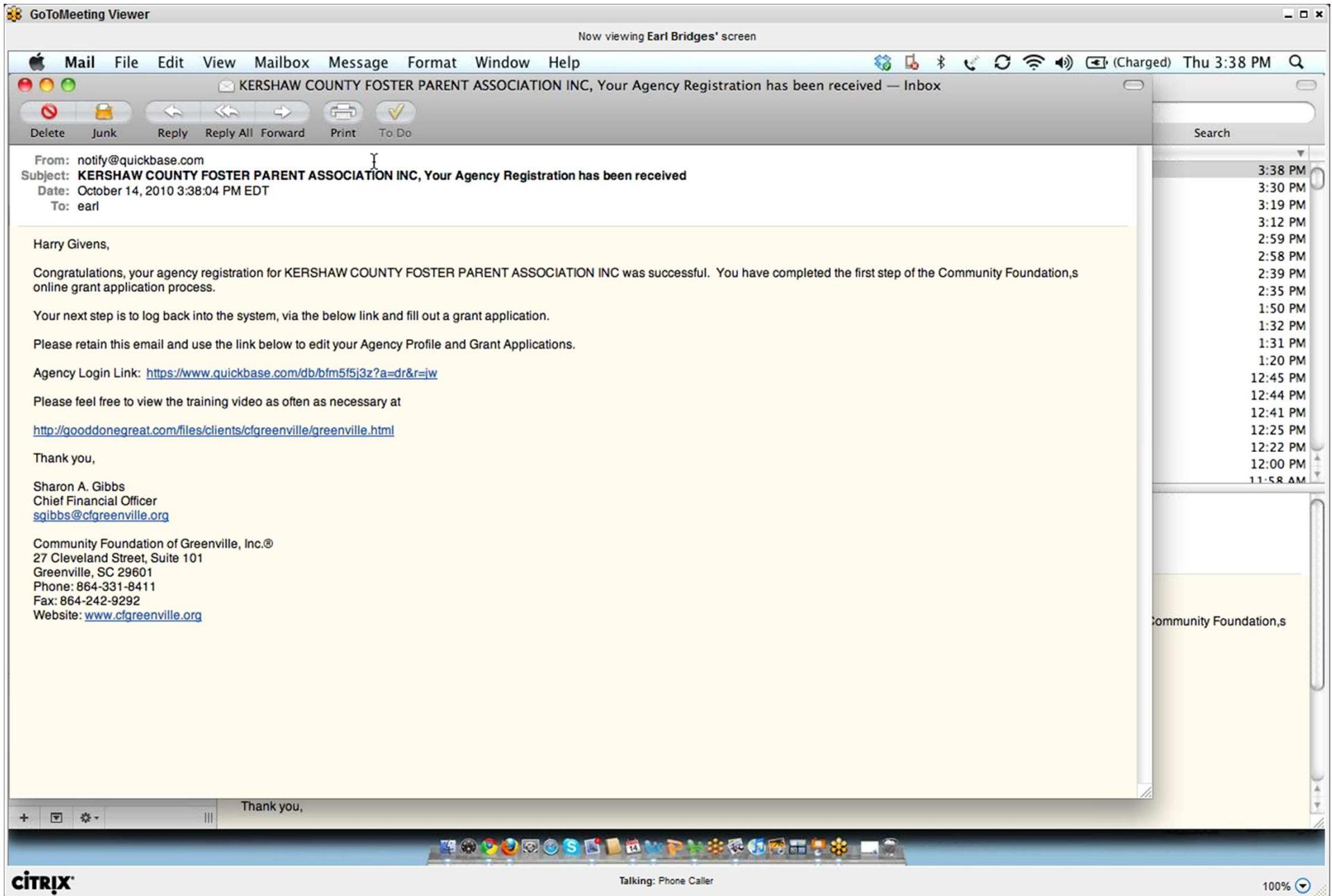
---

- 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.



---

# Grant Management for Foundations



## Auto-Sent E-mail After First Login

The screenshot shows a web browser window titled "GoToMeeting Viewer" displaying a "Grant Application" form. The browser's address bar shows the URL: [https://www.quickbase.com/db/bfm5f5j4h?a=API\\_GenAddRecordForm&\\_fid\\_6=308&z=e15](https://www.quickbase.com/db/bfm5f5j4h?a=API_GenAddRecordForm&_fid_6=308&z=e15). The page header includes the "GOOD DONE GREAT" logo and the title "Grant Application".

The form contains several sections, each with a question mark icon for help:

- Information):** Please be concise in your descriptions.
- Click Here for Total Character Count:** 0
- Purpose of Grant (detailed):** A large text input field with a question mark icon.
- Evaluation Plans:** A text input field with a question mark icon.
- Project Budget Narrative:** A text input field with a question mark icon.
- Organization Information:** A text input field with a question mark icon.

A yellow tooltip box is open over the "Purpose of Grant (detailed)" field, containing the following text:

**Purpose of Grant (detailed):**

- Statement of need/problem to be addressed
- Description of target population and how they will benefit
- Statement as to whether this is a new or ongoing project
- Outline project goals and objectives
- Is this a collaborative effort? If yes, who are the other partners in the project and what are their roles?
- Acknowledge similar existing projects or agencies, if any, and explain how your agency or proposal differs, and what effort will be made to work cooperatively
- Describe the qualifications of key staff and volunteers that will ensure the success of the program.

The bottom of the browser window shows a Citrix taskbar with various application icons and the text "Talking: Phone Caller". The status bar at the bottom right indicates "100%".

## Built-in Grantmaker Provided Help for Each Application Field

GoToMeeting Viewer  
Now viewing Earl Bridges' screen

Firefox File Edit View History Bookmarks Tools Window Help  
GDG Grant Management - Grant Management Administration Dashboard  
quickbase.com https://www.quickbase.com/db/bfm5f5j3f

GDG Grant Management - Grant ...

**GOOD DONE GREAT** Grant Application

Customize Users Recent Find Help

GDG Grant Management AGENCIES APPLICATIONS GRANTS EVALUATIONS CORRESPONDENCE PEOPLE DOCUMENTS SURVEY TEAM FUNDING LOGINS ORGANIZATIONS, etc.

**Grant Management Administration Dashboard** Grant Performance Dashboard Grant Manager Dashboard Customize this Page

Agencies Applications Evaluations Site Visits Grants Toolbox Security

**\_Hollingsworth New Agencies**

FULL REPORT GRID EDIT EMAIL PRINT OTHER Results 1 to 14 (out of 14)

	EIN	Agency Legal Name	Address	Confirmed County	Agency Profile
NEW! EDIT VIEW	22-3772583	FOSTER FAMILY FOUNDATION	38 PLUMBRIDGE CIR, HILTON HEAD, SC, 29928-3361	Beaufort	<a href="#">Print</a>
NEW! EDIT VIEW	57-0983770	FOSTERS CHILD CARE & DEV CTR INC	PO BOX 61446, CHARLESTON, SC, 29419-1446	Charleston	<a href="#">Print</a>
NEW! EDIT VIEW	01-0319131	SIGMA DELTA PI	1047 NORTHBRIDGE DR, CHARLESTON, SC, 29407-3709	Charleston	<a href="#">Print</a>
NEW! EDIT VIEW	01-0686259	TYLER ROSCOE FOUNDATION	PO BOX 13371, FLORENCE, SC, 29504-3371	Florence	<a href="#">Print</a>
NEW! EDIT VIEW	05-0578584	CHARLESTON AREA CHILDRENS GARDEN PROJECT	PO BOX 13302, JAMES ISLAND, SC, 29422-3302	Charleston	<a href="#">Print</a>
NEW! EDIT VIEW	22-3882299	SOUTH CAROLINA GREYHOUND ADOPTION PROGRAM INC	414 3RD AVE S APT D, SURFSIDE, SC, 29575-3694	Horry	<a href="#">Print</a>
NEW! EDIT VIEW	20-1661637	ADOPTION HOPE INTERNATIONAL INC	284 SHOREWARD DR, MYRTLE BEACH, SC, 29579-5146	Horry	<a href="#">Print</a>
NEW! EDIT VIEW	57-1118741	LITTLE ANGELS DAYCARE	246 CAROLINA CT, MARION, SC, 29571-6013	Marion	<a href="#">Print</a>
NEW! EDIT VIEW	57-1085797	KIDS COMPANY DAYCARE	839 BLUESTONE CT, MARION, SC, 29571-6060	Marion	<a href="#">Print</a>

Powered by QuickBase Powered by Good Done Great

Done

CITRIX Talking: Phone Caller 100%

# Grants Management Administration Dashboard

GoToMeeting Viewer  
Now viewing Earl Bridges' screen

Firefox File Edit View History Bookmarks Tools Window Help  
GDG Grant Management -  
quickbase.com https://www.quickbase.com/db/bfm5f5j3f7a=roleprops&roleid=24

GOOD DONE GREAT Grant Application

Customize Users Recent Find Help

GDG Grant Management AGENCIES APPLICATIONS GRANTS EVALUATIONS CORRESPONDENCE PEOPLE DOCUMENTS SURVEY TEAM FUNDING LOGINS ORGANIZATIONS, etc.

### Roles

- Administrator
- Grant Administrator
- Applicant
- Grantee
- Evaluator
- Management View
- Marty**
- New Role

### Marty

Permissions Properties User Interface

**Agencies**

View Records: All Records  
 Modify Records: None  
 Add Records:   
 Delete Records:   
 Save Shared Reports:   
 Full Admin:   
 Fields: Custom Access [edit](#)

**Applications**

View Records: None  
 Modify Records: None  
 Add Records:

LABEL	ACCESS
<a href="#">Confirmed EIN</a>	View/Modify
<a href="#">Confirmed Agency Legal Name</a>	View/Modify
<a href="#">Agency (Legal Name)</a>	View/Modify
<a href="#">Confirmed Combined Address</a>	View/Modify
<a href="#">Combined Address</a>	View/Modify
<a href="#">Confirmed Address</a>	View/Modify
<a href="#">Confirmed City</a>	No Access
<a href="#">Confirmed State</a>	View/Modify
<a href="#">Confirmed Zipcode</a>	View/Modify
<a href="#">Confirmed Ruling Date</a>	View/Modify
<a href="#"># of Applications</a>	View/Modify

Save Cancel

Powered by QuickBase Powered by Good Done Great

Done

CITRIX Talking: Phone Caller 100%

# Detailed Access Rights by Group or User

The screenshot displays a web application interface for 'GDG Grant Management - Marty Reports'. The interface is viewed through a Citrix GoToMeeting Viewer, which shows the user's desktop environment, including the Firefox browser and the application's window. The application is powered by QuickBase and Good Done Great.

The main interface features a sidebar with roles: Administrator, Grant Administrator, Applicant, Grantee, Evaluator, Management View, and Marty (selected). The main content area shows the 'Marty' report configuration panel, which includes sections for 'Home Page', 'Reports', and 'Menus'. The 'Reports' section indicates that there are 34 reports enabled for 'Marty'.

A modal dialog titled 'Marty - Reports' is open, allowing the user to select reports. The dialog lists various report types, including:

- Embedded for Evaluations
- Embedded for Evaluations
- Embedded for Team
- Evaluation List
- First Declination Report
- GIFTS Cleanup
- List All
- List Changes
- Maine CF Report
- Past Awards - Current Applicants
- Pie - Projects by Category
- Previous Awards List

The 'Grants' section of the dialog also includes options like 'Active Grants Dropdown', 'Active Open Grants By Agency', 'Add New Deals (LG)', 'Chart of Total Future Grants by Mgr', 'Chart of Total Won Grants by Rep', 'Closed Grants Per Mgr for Current Period', 'Closed Grants This Period', 'Closed Grants Versus Requests', 'Convert Applications to Grants', 'Embedded for Grant Managers', 'Embedded Grants for Agencies', 'Embedded Grants for Correspondence Form', 'Future Awards By Period', 'Grants', 'Grants On Hold', 'Line Chart of Awards', 'List All', 'List Changes', and 'My Chart of Closed Grants'.

The background page shows a 'Grant Application' page with tabs for 'AGENCIES', 'APPLICATIONS', 'GRANTS', 'EVALUATIONS', 'FUNDING', 'LOGINS', and 'ORGANIZATIONS, etc.'. The page is powered by Good Done Great.

# Standard and Custom Reports by Group or User

GoToMeeting Viewer

Now viewing Earl Bridges' screen

Firefox File Edit View History Bookmarks Tools Window Help

GDG Grant Management - Grant Manager Dashboard

quickbase.com https://www.quickbase.com/db/bfm5f5j3f7a=ShowPage&pageid=2

GDG Grant Management - Grant ...

**GOOD DONE GREAT** Grant Application

Customize Users Recent Find Help

**GDG Grant Management** AGENCIES APPLICATIONS GRANTS EVALUATIONS CORRESPONDENCE PEOPLE DOCUMENTS SURVEY TEAM FUNDING LOGINS ORGANIZATIONS, etc.

Applications Evaluations Packages Grants Toolbox Security

### Current Grant Cycle

#### Size of Organizations

Organization Size Range	Count
0 to 1,000,000 t.	151
1,000,000 t. to 2,000,000 t.	27
2,000,000 t. to 3,000,000 t.	10
3,000,000 t. to 4,000,000 t.	7
4,000,000 t. to 5,000,000 t.	1
5,000,000 t. to 6,000,000 t.	1
6,000,000 t. to 7,000,000 t.	1
7,000,000 t. to 8,000,000 t.	1
8,000,000 t. to 9,000,000 t.	1

[Expand](#)

#### Applications by Status

Application Status	Count
In Process	159
1st Declinat...	68
2nd Declin...	7
Awarded	177

[Expand](#)

#### Pie - Projects by Category

Project Category	Percentage
(blank)	10%
Arts & Hum...	13%
Education	22%
Environment	10%
Health	8%
Religion	10%
Social/Com...	44%

[Expand](#)

### My Correspondence List

FULL REPORT | GRID EDIT | EMAIL | PRINT | OTHER

No results

Powered by QuickBase

Powered by Good Done Great

Done

CITRIX Talking: Phone Caller 100%

# Built-in Graphics

GoToMeeting Viewer

Now viewing Earl Bridges' screen

Firefox File Edit View History Bookmarks Tools Window Help

GDG Grant Management - Automated Emails

quickbase.com https://www.quickbase.com/db/bfm5f5j3f?a=emallist

Most Visited - Getting Started Latest Headlines

GDG Grant Management - Automa...

**GOOD DONE GREAT**

Grant Application

Customize Users Recent Find Help

GDG Grant Management AGENCIES APPLICATIONS

Tables

- Agencies
- Applications
- Grants
- Evaluations
- Correspondence
- Grant Managers
- People
- IRS\_BMF
- Pub78
- Documents
- Survey
- Team

Agencies

Type	Name
<input type="checkbox"/>	Notification <a href="#">Auto Resp</a>
<input type="checkbox"/>	Notification <a href="#">Password</a>
<input type="checkbox"/>	Notification <a href="#">New Reqt</a>

DELETED CHECKED ENABLE CHECKED

CREATE A NEW EMAIL

re Info

nt whenever Agencies are <b>Added</b>	Copy
nt whenever Agencies are <b>Modified</b>	Copy
nt whenever Agencies are <b>Added</b>	Copy

CREATE A NEW EMAIL

Powered by QuickBase

Powered by Good Done Great

Done

Talking: Phone Caller

100%

**Choose a new email type to create**

- Email Notification**

QuickBase sends email notifications when records meeting certain criteria are added, modified or deleted.

- Subscription**

With report subscriptions, QuickBase periodically emails a selected report on a daily, weekly or monthly basis.

- Reminders**

QuickBase will email a reminder to a user a specific number of days before or after the date in a field.

Create Cancel

# Auto E-mail Options



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

Grants: [Unknown] Payment Method: [Cash] [None] Contribution Type: [Unbudgeted] [Select] Addressed To: [ ]

1 of 1 Purpose

United States

JK to Print

Select a Si

Comm

Creating

Pending Review

PENDING

Not Authorized

Cash

**Grant - Microsoft Internet Explorer**

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media



---

**Grant : Committee Score Card**

[Submit](#) | [Review](#)

Special Instructions for the committee members to review.

Questions that the committee should be answering with a score at the right. Weighted values will automatically populate.	Score	Weight	Weighted Value
	0	40%	0
	0	10%	0
	0	20%	0
	0	15%	0
	0	15%	0
<b>Totals</b>	0	100%	0

**Assumptions:**  
Tell the committee members what average weighted value should be funded.

Grant Administration Tool

[Back](#)
[Update](#)
[Decline](#)

# Committee Review

## REGISTRATION

### CAMPUS/LOCAL ADDRESS

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

### PERMANENT ADDRESS

Click if address information is the same as above

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

- [Ou, 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



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



## GIFTS 6.2

- 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: Cash Grants  
Request Status: <None>

Carry over all non-primary contact affiliations  
 Allow this request to be subsequently 'renewed'  
on or after: 10/06/2010

**Renewal Activity**

Staff: Admin  
Date: 10/06/2009  
Notes: Renewal of Grant [673] by Admin  
(F3 = Spell)

<< Custom Fields

OK Cancel

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



# GIFTS Plus Pack 4.5 – Outcomes Plus

- 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...". The "Results" tab is active, displaying a form with the following sections:

Number who will achieve the result.	Number who would achieve this regardless of the program.	Investment per result	Cost Per Result
150	30	\$500.00	\$666.67

**Results Statement**  
Mothers will have a healthy birth weight baby

**Results Verification**  
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**  
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 content is as follows:

From: Todd Lapin  
To: Anna Cellini  
Cc:  
Subject: Letter of recommendation for Anita Rayse- lack of age-appropriate,  
Attachments: letter of recommendation.doc (30 KB)

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](mailto: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-app...

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?

Achieved MORE THAN expected results



# IGAM 4 for GIFTS

- 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 54<sup>ST</sup> 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**

Quarter	Reporting Period	Report Type
First Quarter	July, August, September	Progress Report
Second Quarter	October, November, December	Mid-Term Report
Third Quarter	January, February, March	Financial Report
Fourth 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
<a href="#">Progress Report</a>	Parallel Rapid HIV Antibody Testing during Pregnancy	Final Report	3721	03/31/2014	04/09/2009 12:31:13 PM	
<a href="#">Progress Report</a>	Parallel Rapid HIV Antibody Testing during Pregnancy	Progress Report	3719	12/31/2012	04/09/2009 12:35:46 PM	
<a href="#">Progress Report</a>	Parallel Rapid HIV Antibody Testing during Pregnancy	Progress Report	3720	04/30/2009	04/30/2009 9:47:41 AM	

Internet

- 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 CRM interface for MicroEdge FIMS CRM. The browser window title is "Opportunity: James Barclay-2009-03-15 ~ Salesforce - Enterprise Edition - Mozilla Firefox". The URL is "https://cs1.salesforce.com/006500000021nfr". The page header includes the MicroEdge FIMS CRM logo, navigation links (Home, Leads, Profiles, Opportunities, Households, Documents, Reports), and a login status: "YOU ARE CURRENTLY LOGGED IN AS DONOR SRVS USER".

The main content area shows the "Opportunity Detail" for "James Barclay-2009-03-15". It is divided into three sections:

- Event/Attendance Information:**

Opportunity Name	James Barclay-2009-03-15	Opportunity Record Type	EventAttendance Support <a href="#">[change]</a>
Profile Name	James Barclay	Event	2009 Dinner Dance
Type	Event Registration	Close Date	3/15/2009
Registration/Supporter Option		Probability (%)	100%
Stage	GiftPayment Received		
Fee Amount	\$500.00		
Donation Amount	\$1,000.00		
Amount	\$1,500.00		
Inkind Gift Value			
- Attendee Count:**

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		

At the bottom of the page, there are buttons for "Edit", "Delete", "Clone", and "Sharing".



## 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** Essential GIFTS Online

Home Settings Help Logout  
Layout

**Grants Manager Tasks**

**Quick Search**

Organizations  
Contacts  
Requests

**Grants This Year by Program Area**

Arts and Culture  
Civic and Community  
Education  
Health and Human Services

**Grants Manager Tasks**

**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) 698-1			

Items 1 - 2 of 2

**Under Review**

Organization	Contact
Big Brothers Big Sisters of New York City New York, NY	Ms. Mary Jo (212) 698-1
The Childrens Scholarship Fund New York, NY	Ms. Georgina (212) 555-4
The Childrens Scholarship Fund New York, NY	Mr. Al Jeffer (212) 555-4
University Of Pennsylvania Medical Philadelphia, PA	Mr. Lawren Stewart (215) 662-4
New York Youth Sing for Peace New York, NY	Ms. Jamie E 212-555-78

Items 1 - 5 of 9

**J Smith's Essential GIFTS Online** 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 98078  
Phone (405) 555-5544  
Fax  
E-mail Address [info@cachildren.org](mailto:info@cachildren.org)  
WWW Address [www.cachildren.org](http://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.

**Primary Contact**

Name Mr. David Anderson  
Title Program Director

**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



salesforce.com - Developer Edition

Setup · System Log · Help · Logout

force.com apps Grants & Apps

Foundation Grant Manager

Home LOIs Organizations Contacts Grants & Apps Reports Dashboards Dockets

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

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

Messages and Alerts  
Portal  
Logo

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**

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

**CY Awarded**

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

**CY Grant Amounts**

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.

# Foundation Grant Manager Letter of Inquiry



The screenshot shows the Salesforce interface for the Foundation Grant Manager. The browser address bar indicates the URL is 'LOI: Brad Helles ~ salesforce.com'. The page title is 'LOI: Brad Helles'. The navigation menu includes Home, LOIs, Organizations, Contacts, Grants & Apps, Reports, Dashboards, and Dockets. The main content area displays the details for the LOI for Brad Helles, including Organization (Green Design), Project Name (Living Green Seminars 2009), Request Number (09-Need an Autonumber Value), and Requested Amount. The Primary Contact section lists Brad Helles, Senior Manager, with contact information for email, phone, fax, and web address. The Timeframe section shows the proposed start and end dates of the project. The Narrative section includes the Grant Purpose. The Board Summary section lists other sources of project and general funding.

LOI: Brad Helles ~ salesforce.com

Setup · System Log · Help · Logout

force.com  
apps

Grants & Apps

Home LOIs Organizations Contacts Grants & Apps Reports Dashboards Dockets

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

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

LOI  
Brad Helles  
Printable View | Customize Page | Edit Layout | Help for this Page

LOIs History (2) | Open Activities (0) | Activity History (5) | HTML Email Status (5) | Notes & Attachments (0)

LOI Detail  
Edit Delete Convert Clone Find Duplicates

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

Primary Contact

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

Timeframe

Proposed start date of the project	Proposed end date of the project
------------------------------------	----------------------------------

Narrative

Grant Purpose

Board Summary

Other Sources of Project Funding	
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.

# Foundation Grant Manager Grants & Apps



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  
Go!  
 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 (1) | Notes & Attachments (5+)

Grants & Apps Detail Edit Delete Clone Setup Payments Setup Reports Setup Benchmark

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		
Multyear?	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.

# Foundation Grant Manager

## Related Lists



Grants & Apps: Green Design - Living...

---

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

Action	Contact Name	Organization Name	Email	Phone	Role	Primary
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Brad Helles</a>	<a href="#">Green Design</a>	<a href="#">brad.helles@npowermy.org</a>	(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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email: Grant Application - Where We Are Template</a>	<a href="#">Brad Helles</a>	✓	9/30/2009	<a href="#">Anand Sethupathy</a>	9/30/2009 10:33 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email: Grant Application - Summary and Benchmarks Template</a>	<a href="#">Brad Helles</a>	✓	9/30/2009	<a href="#">Anand Sethupathy</a>	9/30/2009 10:32 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email: Grant Application - Received Template</a>	<a href="#">Brad Helles</a>	✓	9/30/2009	<a href="#">Anand Sethupathy</a>	9/30/2009 10:30 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email: Grant Application - Received Template</a>	<a href="#">Brad Helles</a>	✓	9/30/2009	<a href="#">Anand Sethupathy</a>	9/30/2009 10:27 PM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Email: Grant Application - Missing Items Template</a>	<a href="#">Brad Helles</a>	✓	9/30/2009	<a href="#">Anand Sethupathy</a>	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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CRP-00103</a>	<a href="#">Green Design</a>	\$25,000		9/30/2009	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CRP-00104</a>	<a href="#">Green Design</a>	\$25,000		9/30/2010	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CRP-00105</a>	<a href="#">Green Design</a>	\$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
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GR-1101</a>	<input type="checkbox"/>		9/30/2010		<a href="#">Anand Sethupathy</a> , 9/28/2009 10:13 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GR-1102</a>	<input type="checkbox"/>		9/30/2011		<a href="#">Anand Sethupathy</a> , 9/28/2009 10:13 AM
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">GR-1103</a>	<input checked="" type="checkbox"/>		9/30/2012		<a href="#">Anand Sethupathy</a> , 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.)

# Foundation Grant Manager Reporting Engine



**EXAMPLE - Grant Summary by Status**

Summarize information by:

**Time Frame**  
Interval:  Duration:   
Start Date:  End Date:

View:  Grants & Apps Status:  Probability:

**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.



**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** [Edit](#) [Delete](#) [Clone](#)

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

**Tax Status Verification Source**

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

**Links**

**Organization Information**

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

**Tax Classification**

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



salesforce.com - Developer Edition

Setup · System Log · Help · Logout

force.com apps Grants & Apps

NP Power Foundation Grant Manager

Home LOIs Organizations Contacts Grants & Apps 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.



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# 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@nhilantech.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](mailto: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**

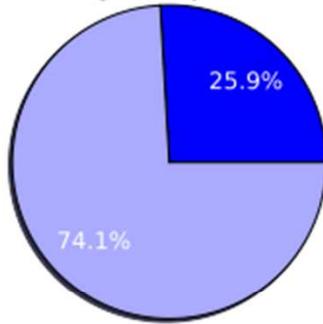
[Edit »](#)

---

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

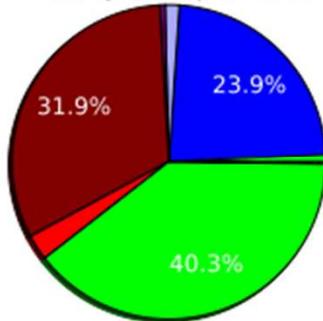


[Enlarge and view details](#)

[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 <a href="#">add documents</a>					
File name	Summary	Size	Datetime added	Added By	Action
<a href="#">Grant Agreement.doc</a>	Grant Agreement	25 KB	2009-02-12	Tim Smythe	<a href="#">Edit</a>   <a href="#">Delete</a>
<a href="#">Site Visit Notes.doc</a>	Site Visit Notes	25 KB	2009-02-12	Tim Smythe	<a href="#">Edit</a>   <a href="#">Delete</a>

## 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:

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:

Letter of Inquiry:

Letter of Inquiry Template:

## Enhanced Funding Cycle Management

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



solpath 

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# The Open Source Grants Management Platform

GoToWebinar Viewer

**FLUXX** Dashboard: Default Jason Ricci Logout

**REQUESTS**

Program: Buildings

Sub program:

Request Type:

Status:

PO/Lead:

Created by:

Funding Source:

Amount Recommended: Greater Than:

Less Than:

**REQUESTS**

Search...

**Solpath, Inc.**  
\$100,000 | 10/14/2010 | Buildings | R-1010-13422  
Testing

**HUD Meeting Travel**  
\$2,000 | 10/04/2010 | Buildings | FR-1010-13415  
To provide travel support to allow energy efficiency expert Nehemiah Stone to travel to attend meetings at HUD with other Energy Foundation grantees.

**Voices for a Sustainable Future, a project of Stone Soup Inc.**  
\$100,000 | 09/24/2010 | Climate | R-1009-13366  
To support the Labor Network for Sustainability.

**Clean Economy Network Foundation**

« Previous 1 - 25 of 192 Next »

**ORGANIZATIONS**

Search...

**China - Electric Power Research Institute**  
Shanghai, CHN

**Solpath, Inc.**  
San Francisco, CA, USA

**Chinese Academy of Sciences, Guangzhou Institute of Energy Conversion**  
Wushan, CHN

**Energy Assessment Center of Zhejiang University**  
Hangzhou, CHN

**\$1 Energy Fund**

« Previous 1 - 25 of 7,173 Next »

**PEOPLE**

Search...

grant\_admin\_user EF De

pa\_user EF Demo User

pd\_user EF Demo User

president\_user EF Demo

svp\_user EF Demo User

Eric Hansen

EricTest HansenTest Engineer

« Previous 1 - 25 of 13,127 »












**CITRIX** 100%

## Basic Screen with Search Request

GoToWebinar Viewer

**FLUXX** Dashboard: Default Jason Ricci Logout

### BUILDINGS REQUESTS

Search...

**HUD Meeting Travel**  
 \$2,000 | 10/04/2010 | Buildings | FR-1010-13415  
 To provide travel support to allow energy efficiency expert Nehemiah Stone to travel to attend meetings at HUD with other Energy Foundation grantees.

**ICLEI - Local Governments for Sustainability U.S.A., Inc.**  
 \$100,000 | 10/04/2010 | Buildings | R-1010-13414  
 Commercial building retrofits

**ICLEI - Local Governments for Sustainability U.S.A., Inc.**  
 \$50,000 | 09/16/2010 | Buildings | R-1009-13315  
 To educate local governments on the benefits of increasingly efficient energy codes for buildings and remove barriers to code officials participation in the ICC Final Action hearings.

11 Entries

[Edit](#) [Delete](#) [Make Favorite](#) [Printable](#) [Reject](#) [Send Back](#) [Approve](#)

### ICLEI - Local Governments for Sustainability U.S.A., Inc.

#### R-1009-13315

Request for \$50,000

To educate local governments on the benefits of increasingly efficient energy codes for buildings and remove barriers to code officials participation in the ICC Final Action hearings.

\* This grant is a renewal

Status: Pending President Approval →

Request Submitted: 9/16/10  
 Final Proposal Date: 9/16/10  
 Final Budget Date: 9/16/10  
 Tax Status: 509a1  
 Duration: 3 months

Main Contact: Cyrus Bhedwar  
 Program: Buildings  
 Sub-Program: Buildings

### CLIMATE REQUEST

Search...

**Voices for a Sustainable Future, a project of Stone Soup Inc.**  
 \$100,000 | 09/24/2010 | Climate | R-1009-13366  
 To support the Labor Network for Sustainability.

**Travel support**  
 \$25,000 | 09/23/2010 | Climate | FR-1009-13358  
 To support travel expenses to promote understanding of US carbon reduction potential, based on WRI's recent report

**Energy Action Coalition, a project of Earth Island Institute, Inc.**  
 \$150,000 | 10/04/2010 | Climate | R-1010-13413  
 To support the education and engagement of youth on climate policy issues.

**VA Business Council Sept-Oct**

« Previous 1 - 25 of 30 Next »

## Grant Detail Screen with Tabs

GoToWebinar Viewer

**FLUXX** Dashboard: Default Jason Ricci Logout

### BUILDINGS REQUESTS

Meeting Travel  
10/04/2010 | Buildings | R-13415  
Travel support to allow energy expert Nehemiah Stone to travel to meetings at HUD with other Energy grantees.

- Local Governments for Sustainability U.S.A., Inc.  
10/04/2010 | Buildings | R-13414  
Building retrofits

- Local Governments for Sustainability U.S.A., Inc.  
09/16/2010 | Buildings | R-13315  
Local governments on the benefits of energy efficient energy codes for buildings and remove barriers to code officials participation in Final Action hearings.

11 Entries

#### ICLEI - Local Governments for Sustainability U.S.A., Inc. R-1009-13315

Request for \$50,000

To educate local governments on the benefits of increasingly efficient energy codes for buildings and remove barriers to code officials participation in the ICC Final Action hearings.

\* This grant is a renewal

Status: **Pending President Approval** →

Request Submitted: 9/16/10  
Final Proposal Date: 9/16/10  
Final Budget Date: 9/16/10  
Tax Status: 509a1  
Duration: 3 months

Main Contact: Cyrus Bhedwar  
Program: Buildings  
Sub-Program: Buildings

#### VIEW WORKFLOW

- New Request
- Funding Recommended
- Pending Grant Team Approval
- Pending PD Approval
- Pending Deputy Director Approval
- Pending SVP Approval
- Pending Grant/FIP Promotion
- Granted
- Closed

Talking: EF Administrator 100%

# Workflow Options

GoToWebinar Viewer

**FLUXX** Dashboard: Default Jason Ricci Logout

### BUILDINGS REQUESTS

Search...

**HUD Meeting Travel**  
 \$2,000 | 10/04/2010 | Buildings | FR-1010-13415  
 To provide travel support to allow energy efficiency expert Nehemiah Stone to travel to attend meetings at HUD with other Energy Foundation grantees.

**ICLEI - Local Governments for Sustainability U.S.A., Inc.**  
 \$100,000 | 10/04/2010 | Buildings | R-1010-13414  
 Commercial building retrofits

**ICLEI - Local Governments for Sustainability U.S.A., Inc.**  
 \$50,000 | 09/16/2010 | Buildings | R-1009-13315  
 To educate local governments on the benefits of increasingly efficient energy codes for buildings and remove barriers to code officials participation in the ICC Final Action hearings.

11 Entries

\$50,000.00 Total Funding

Request Letters

Relationships [link an org](#) [link a person](#)

No links to organizations

No links to people

Request Details

Funds Expended:

Initiative Type: Mature

Constituent: Environment

Means: Grasstops Organizing

Types of Organization:

Geographic Focus: National, USA  
Federal, USA

REQUEST DOCUMENTS

- ICLEI\_Energy\_Codes\_Cam...
- ICLEI\_Energy\_Codes\_Cam...
- ICLEI\_Energy\_Codes\_Cam...

ORGANIZATION DOCUMENTS

- ICESupportingDocs2009...
- ICLEI\_IRS.PDF
- ICLEI\_Charity\_Check.pdf

Edit Delete Make Favorite Printable Reject Send Back Approve

### CLIMATE REQUEST

Search...

**Voices for a Sustainable Future, a project of Stone Soup Inc.**  
 \$100,000 | 09/24/2010 | Climate | R-1009-13366  
 To support the Labor Network for Sustainability.

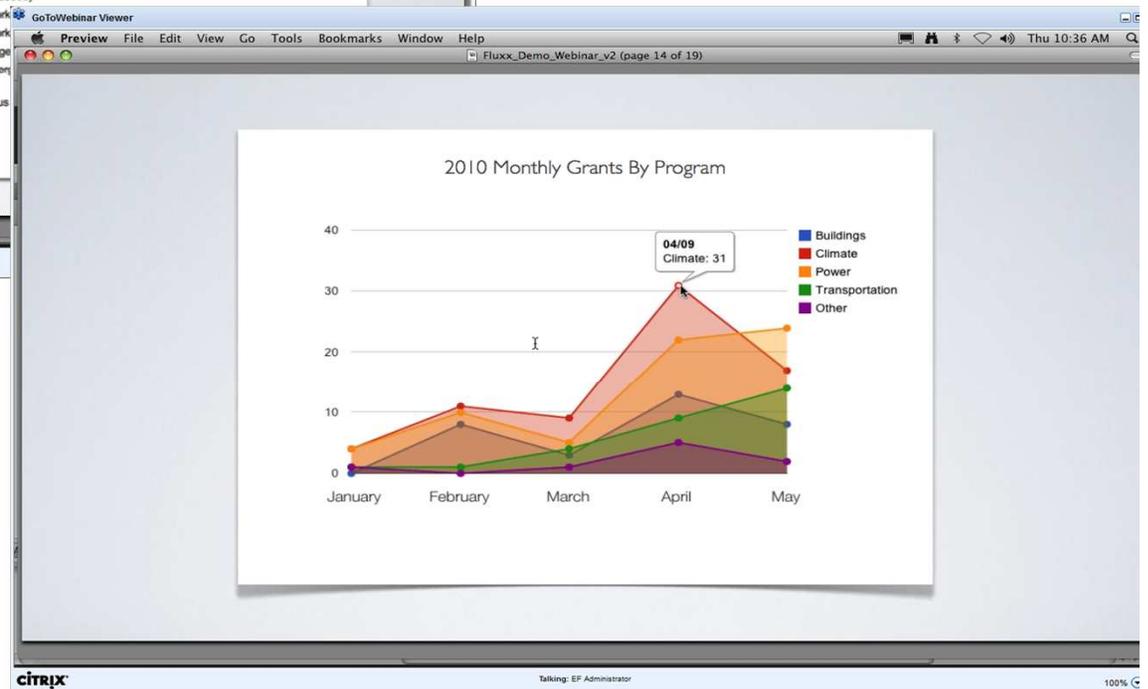
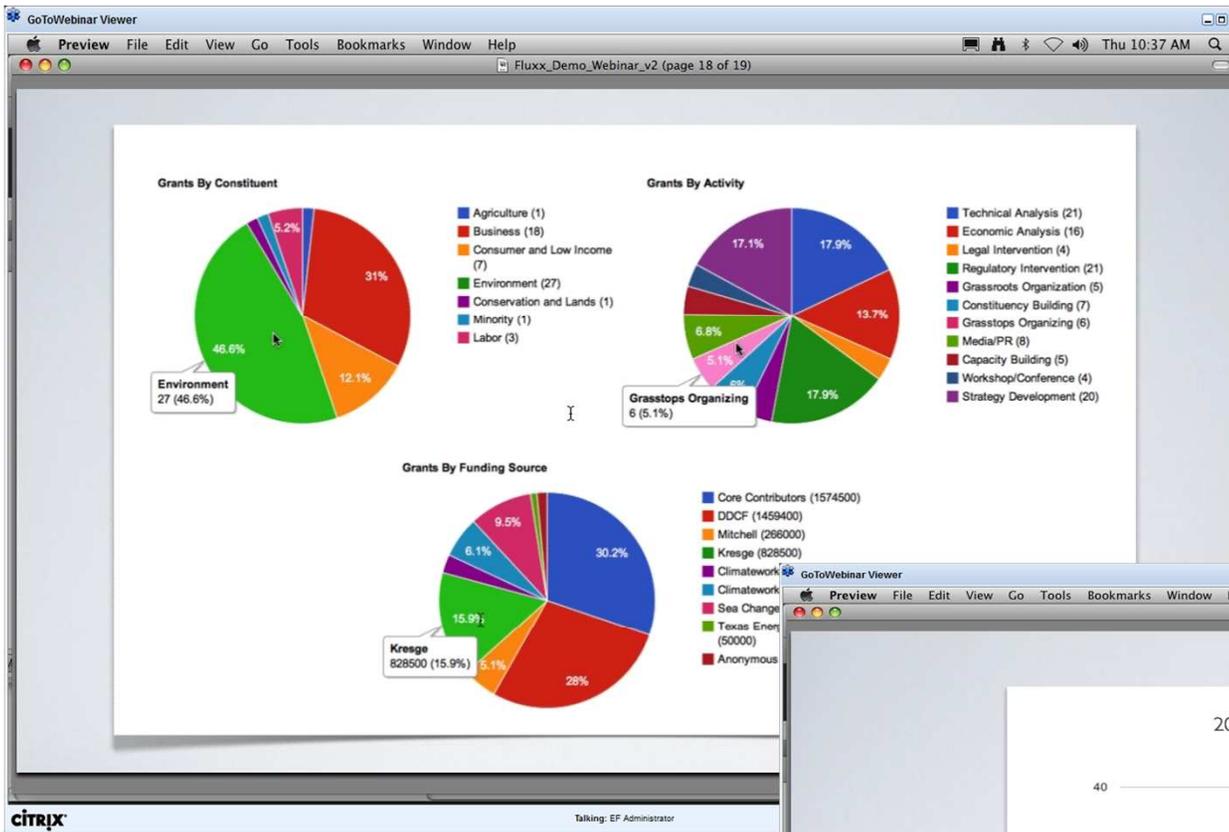
**Travel support**  
 \$25,000 | 09/23/2010 | Climate | FR-1009-13358  
 To support travel expenses to promote understanding of US carbon reduction potential, based on WRI's recent report

**Energy Action Coalition, a project of Earth Island Institute, Inc.**  
 \$150,000 | 10/04/2010 | Climate | R-1010-13413  
 To support the education and engagement of youth on climate policy issues.

**VA Business Council Sept-Oct**

« Previous 1 - 25 of 30 Next »

# Attached Documents



# Graphical Presentation of Data

GoToWebinar Viewer

**FLUXX** Dashboard: Default Jason Ricci Logout

REQUESTS

GRANTS

ORGS

add a relationship

edit delete  
make primary  
edit delete  
Primary Org

### GRANTS/FIPS

Search...

**Solpath, Inc.**  
\$300,000 | 10/14/2010 | Buildings | G-1010-13425  
Testing

**White Roofs Alliance, a project of Trust for Conservation Innovation**  
\$32,600 | 10/04/2010 | Buildings | G-1009-13280  
To serve as temporary organizational support for the White Roofs Alliance as it begins to implement its business plan and hire full-time staff.

**Alliance to Save Energy**  
\$100,000 | 09/30/2010 | Buildings | G-1007-13092  
To advance federal residential and commercial building code efficiency.

**North Carolina Building Inspector's Association, Inc.**

« Previous 1 - 25 of 53 Next »

### CONVERSION FUNNEL

51 Grants at an average of 27 days.

**Submitted -> Final Proposal**  
7 days (41 grants)

**Final Proposal -> IERF Complete**  
7 days (44 grants)

**Grants Approved**  
1 day (29 grants)

**PO Approved**  
7 days (4 grants)

**PD Approved**  
4 days (41 grants)

**Secondary PD Approved**  
35 days (1 grant)

**SVP Approved**  
6 days (44 grants)

CSV Printable

100%

# Lapse Time Reporting



# Solpath Fluxx Announced Roadmap as of October 2010

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- Budgeting Module
- Visualizations and Reports
- MS Exchange Sync
- Salesforce Connector
- Raiser's Edge Connector
- Financial Systems Integration
- iPhone Apps



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

<http://www.iaa.com>