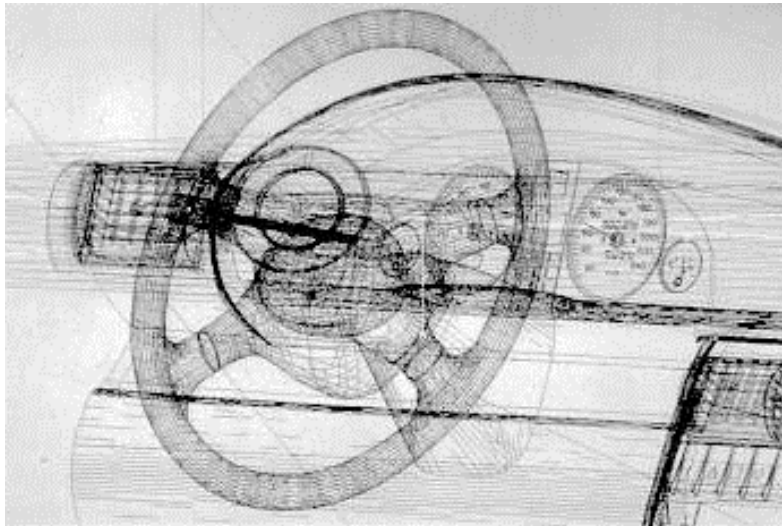


# Digital Dashboards: Best Practices and Lessons Learned

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March 18, 2013

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609-924-6936

# A User-Centered Design Approach Can Result in an Intuitive Interface

---

“A usable interface becomes invisible;  
sometimes you know you've gotten it  
right when your customers/users don't  
talk about how usable the product is . . .  
they're too busy raving about how  
you've made their life better.”

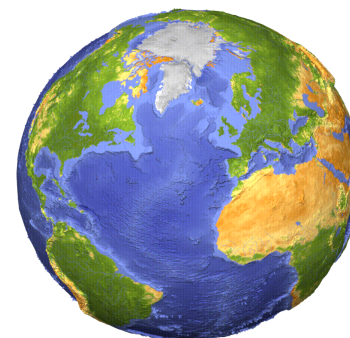
Don Norman, useit.com, "The Design of Everyday Things"  
published in 1988



# Some Benefits of Digital Dashboards for Grantmakers

---

- *See the big picture* of information and operations
- Graphical representation of data and performance measures
- Measure efficiencies and inefficiencies
- Quickly identify correlations and data outliers
- See key trends that need adjustment or correction
- *Ability to make better informed decisions* based on accurate information
- It's more effective than just running reports



# Digital Dashboards

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Many thanks to CSDC Grantium and MicroEdge for sharing some of their useful lessons learned and recommendations

# Best Practices

---

- Who are your information consumers?

- They may not be inputting or managing data, but are already consuming reports from the system.
- They can become *self-service users*.



- Make the focus being “actionable information” and “lessons learned”!

- What information (vs. data) do staff need at their fingertips in an at-a-glance format?

# More Best Practices

---

- Don't try to graphically represent non-quantitative data.
- Get dashboard requirements from users.  
(e.g. what do staff **need** and want to see)
- What searches/reports are run most often? Which aren't and need to be?
- Start by creating a whiteboard layout.
- Use requirements to develop standard dashboard parts for each user type.



# More Best Practices

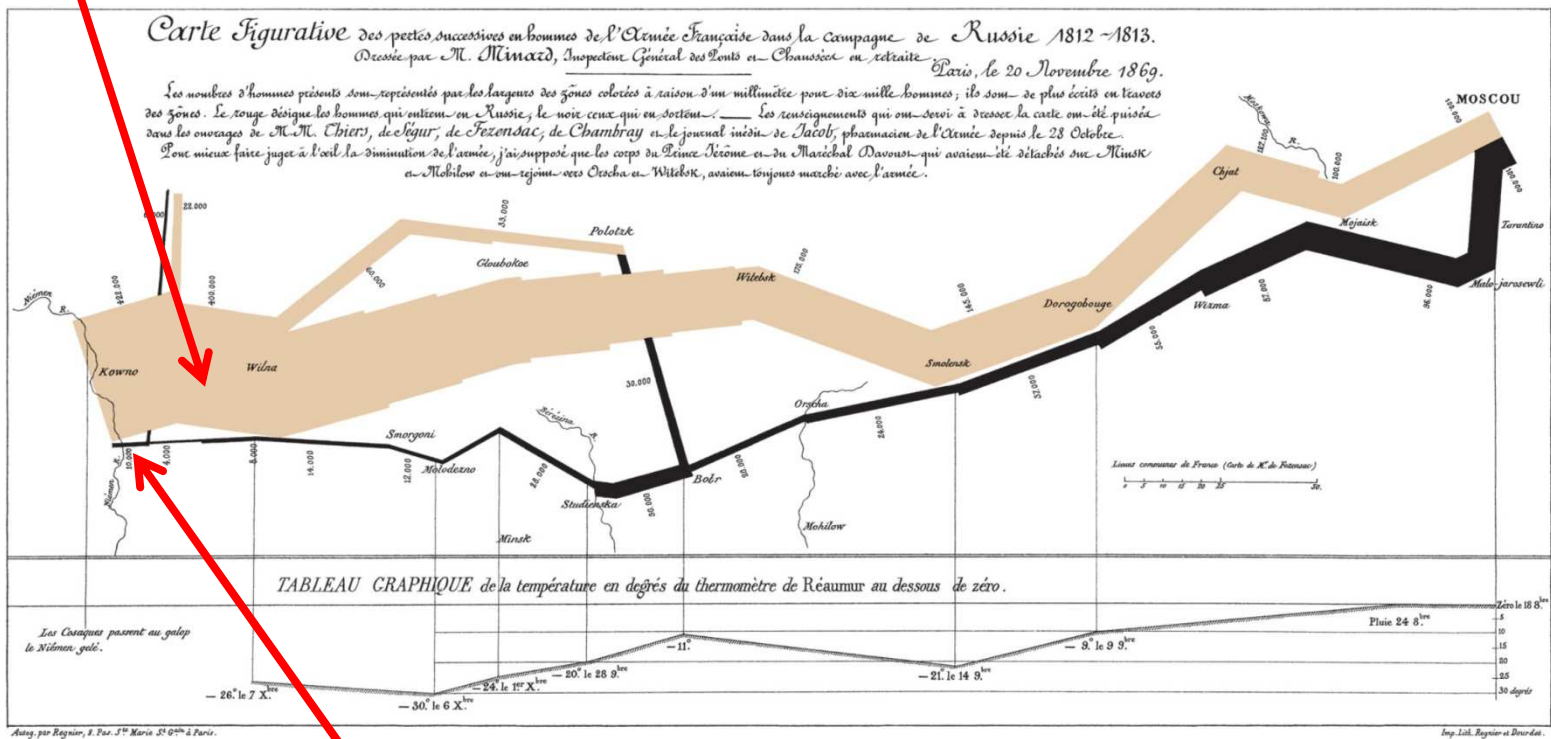
---

- Decide who is best qualified to create and maintain accurate dashboards.  
*(The data is complex and it's easy to make a mistake creating a dashboard view)*
- Make each graphic part do double (or triple) duty when possible.  
*(e.g. YTD to current to a detailed view)*
- Use the graphic type that best conveys the information you're displaying.  
*(e.g. a bar chart for comparison vs. a line chart for trend)*



# Napoleon's 1812-1813 "Grand Army" Invasion of Moscow from Kowno Lithuania

## 500,000 French troops head east to invade Moscow



**Only 27,000 French troops returned to Kowno after the successful Russian "scorched-earth tactic"**



# More Best Practices

---

- Develop simple instructions and templates for creating and using dashboards parts.
- Train each type of user how to use their dashboards and record training for traveling staff.
- Repeat training months later and regularly so staff have times to use the system and ask questions.



# Some Important Things to Do

---



# Some Important Things to Do

---

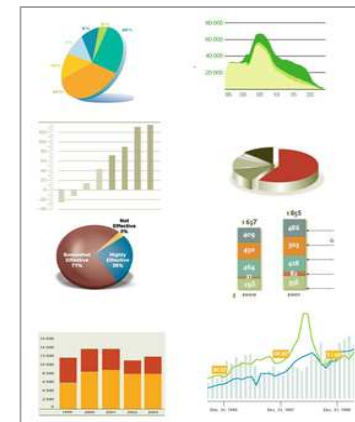
- Clarify scope with users and conduct a thorough requirements analysis.
- Build, evaluate and refine prototypes.
- Distinguish between requirements for dashboards vs. regular reports.



# Some More Important Things to Do

---

- Consider consolidating information on a single screen display (*keep in mind the limited real estate on smaller screens*).
- Use the appropriate graphical display medium for efficient communication of data (*graphs are understood faster than lists/tables*).
- The better the quality of data available, the more meaningful the dashboard.



# Major Potholes . . . and What Not to Do

---



# Some of the Major Data-related Potholes



1. Data that's missing and/or has gaps
2. Incomplete data
3. Inaccurate data
4. Incorrectly entered data
5. Inconsistently coded data
6. Diversely coded data
7. Different standards by different staff
8. Duplicate records (*orgs, requests and contacts*)

# More Major Data-related Potholes

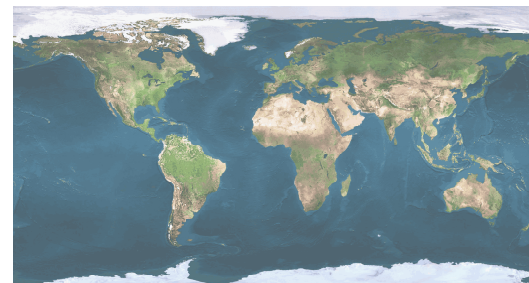


- No clear definition of “minority” that changes among countries and over time.
- Constantly changing synonymous “codes du jour”. ← French for “codes of the day”
- Too many unnecessary levels of codes.
- Different coding terminology and program names among:
  - Grant database
  - Accounting system (AP)
  - Communications for the Board, pubs and Web

# Some of the Most Common Data Mapping Problems

---

- Mapping only the grantee's HQ office location vs. the grant program's geographic area served.
- Mixing all of these codes at the same level:
  - Continents, countries, regions, counties, states, cities and neighborhoods  
*(often using non-standard names)*
- Countries and cities listed in the wrong continents.

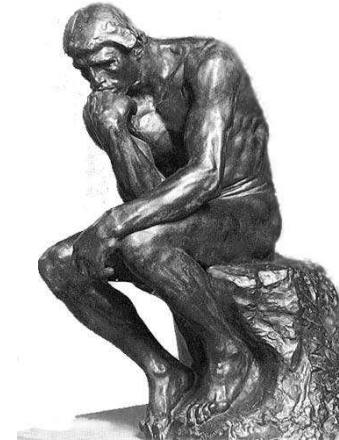




# Examples of Good Coding

---

- A logical graphical hierarchy
  - Continent
  - Country
  - State, province, prefecture, canton
  - County
  - City
  - Borough or neighborhood
- Use standard code names that last over time, that are logical and enable searching.





# Some Types of Digital Dashboards

---

Bar charts	Maps (U.S. and worldwide)
Pie charts	Summary statistics
Line charts	Trend charts
Bullet graphs	Cards (e.g. contact info)
Area chart	Meters
Tables	Calendars
Gauges	Timeline charts

# 23 North American Integrated Foundation Information System Software and Service Providers



# A Delectable Smörgåsbord of Digital Dashboards

---





# Outlook Link to Grant Data

Microsoft Outlook ← Outlook

File | Contacts | View | Charts | Add | Customize | Add-Ins

Records: New, Edit, Deactivate, Delete, Merge, Send Direct E-mail, Add to Marketing List, Collaborate: Connect, Assign, Copy a Link, E-mail a Link, Process: Run Workflow Dialog, Start Dialog, Data: Run Report, Export to Excel, Import Data, Advanced Find, Help

**Grant information** → Akoyabase

- Grant Management
  - Grant Management
    - Dashboards
    - Requests
    - Activities
    - Constituents
    - Contacts**
    - Requests Payments
    - Requests Requirement
    - Requests Budgets
    - Requests Roles
  - Akoya Extras
  - Settings

Active Contacts

Full Name	Job Title	Parent Constituent	E-mail
Andrea Lenore	Director of Developm...	Jones Fine Arts Camp	support
Annie Labrith	President	Montana Tenants Network	kristin@
Brian Smith		Energy Alternatives	kristin9;
Brian Waters	Project Supervisor	Missoula Community Cent...	Brian@I
Bruce Andersen	Executive Director	YMCA of Missoula	karen@
Bruce Wiggins	Executive Director	Milwaukee Urban Gardens	bwiggin
Candice Smith	Director of Developm...	St. Anthony Block Nurse Pr...	candice
Cheryl Weber	Director	Great Falls Human Services	
Christine Walske	Principal	New Horizons Schools	christine
Christopher Williams	Museum Curator	American Swedish Institute	CWilliam
Christy Petersen	Director of Programs	American Swedish Institute	kristin9;
Dan Varley		Federation of Scholars	danielja

1 - 86 of 86 | Page 1

Full Name... Andrea Lenore  
Company: Andrea Lenore (support@bromelkamp.com)

September 2012

Su	Mo	Tu	We	Th	Fr	Sa
26	27	28	29	30	31	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	1	2	3	4	5	6

Today

- Run backup 5:00 PM - 5:30 PM

Monday

- Team Reps 10:00 AM - 11:30 AM  
Tele Conference; Jan Maino
- Lunch 12:00 PM - 1:00 PM

Tuesday

- Dan/Kristin update 9:00 AM - 10:00 AM  
Kristin Hardin

2 more appointments

# Charts, Tables and Pie



**Different chart types**

The screenshot displays a Microsoft Dynamics CRM dashboard titled "Requests Status". It features three main data visualization components:

- Request Status Summary (Bar Chart):** A bar chart showing the count of requests by status. The Y-axis is "Count All (Request ID)" ranging from 0 to 25. The X-axis is "Request Status".

Request Status	Count
(blank)	3
Approved	23
Denied	9
New	3
Pending	17

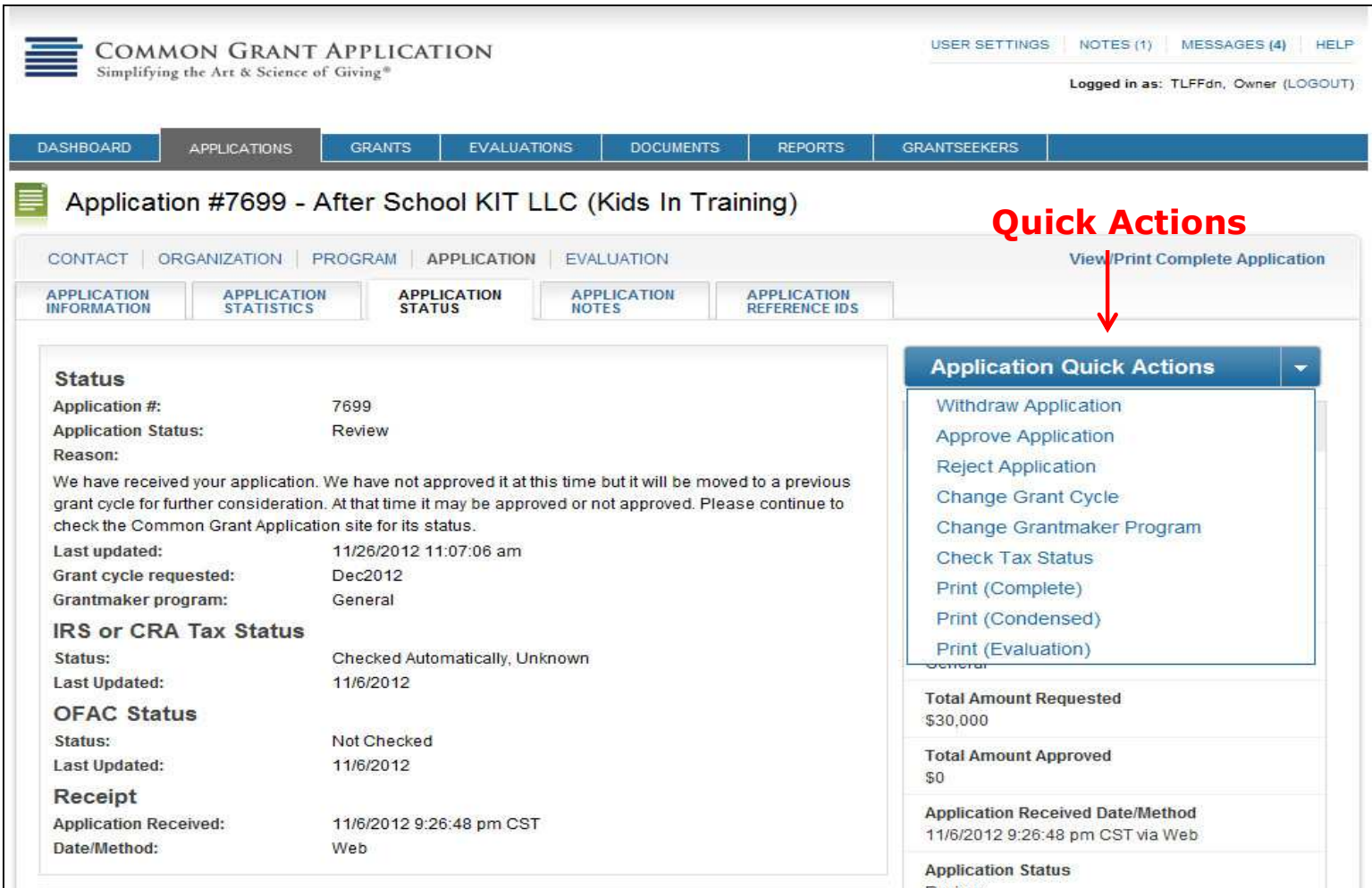
- Requests: New Submissions (Table):** A table listing various requests with columns for Applicant, Requested Amount, and Title.

Applicant	Requested Amount	Title
American Swedish	\$5,000	Block Nurse Visits in Pe
Fun and Games	\$7,000	Modeling Activity Roof
Jordan Trust	\$100,000	Phase II
Ke Alii Pauahi Fou	\$1,000,000	scholarships
Non-Profit Assista	\$12,000	Operating Support for
Senior Care Servic	\$5,000	Block Nurse Visits in Pe
The Spirit of Youtl	\$20,000	Support for a New SOY
Velma Mcdonald	\$50,000	Saving the Youth

- Awards by Program (Pie Chart):** A pie chart showing the distribution of awards by program. The largest slice is "Community Building" at \$1,000,000. Other categories include "Discretionary" and several smaller amounts.

Program	Amount
Community Building	\$1,000,000
Discretionary	\$600,000
Other	\$46,000

# Application Status with Quick Action Dropdown



The screenshot displays the 'COMMON GRANT APPLICATION' web interface. At the top, there is a navigation bar with 'DASHBOARD', 'APPLICATIONS', 'GRANTS', 'EVALUATIONS', 'DOCUMENTS', 'REPORTS', and 'GRANTSEEKERS'. The current page is titled 'Application #7699 - After School KIT LLC (Kids In Training)'. Below the title, there are tabs for 'CONTACT', 'ORGANIZATION', 'PROGRAM', 'APPLICATION', and 'EVALUATION'. The 'APPLICATION' tab is active, showing sub-tabs for 'APPLICATION INFORMATION', 'APPLICATION STATISTICS', 'APPLICATION STATUS', 'APPLICATION NOTES', and 'APPLICATION REFERENCE IDS'. The 'APPLICATION STATUS' sub-tab is selected, displaying the following information:

<b>Status</b>	
Application #:	7699
Application Status:	Review
Reason:	We have received your application. We have not approved it at this time but it will be moved to a previous grant cycle for further consideration. At that time it may be approved or not approved. Please continue to check the Common Grant Application site for its status.
Last updated:	11/26/2012 11:07:06 am
Grant cycle requested:	Dec2012
Grantmaker program:	General
<b>IRS or CRA Tax Status</b>	
Status:	Checked Automatically, Unknown
Last Updated:	11/6/2012
<b>OFAC Status</b>	
Status:	Not Checked
Last Updated:	11/6/2012
<b>Receipt</b>	
Application Received:	11/6/2012 9:26:48 pm CST
Date/Method:	Web

On the right side of the application details, there is a 'Quick Actions' dropdown menu. A red arrow points to this menu, which is titled 'Application Quick Actions'. The dropdown menu is open, showing the following options:

- Withdraw Application
- Approve Application
- Reject Application
- Change Grant Cycle
- Change Grantmaker Program
- Check Tax Status
- Print (Complete)
- Print (Condensed)
- Print (Evaluation)

Below the dropdown menu, there are summary statistics for the application:

<b>Total Amount Requested</b>	\$30,000
<b>Total Amount Approved</b>	\$0
<b>Application Received Date/Method</b>	11/6/2012 9:26:48 pm CST via Web
<b>Application Status</b>	Review

# Grantseeker Step-by-Step Application Progress

## The Lawrence Foundation

Program: General

**Draft Application**  
Logged in as: testgsk2002, Owner (LOGOUT)  
NOTES (0) | HELP

Select Grantmaker | Select Gmk Program | Grantmaker Instructions | **Primary Contact** | Org Background | Fiscal Agent Contact | Org Docs | Select Gsk Program | Prog Background | Prog Docs | Prog Media | App Info | Preview App | Submit App

< Previous | Pause | Save | Next >

### Primary Contact ?

How do I enter a fiscal agent?

**Name And Title \*** \* Required Fields

Salutation: None

First Name: \* Jane

Last Name: \* Smith

Title:

**Work Address \*** \* Required Fields

Organization Name: \* Grantseeker 1 ?

Address 1: \* 123 South St.

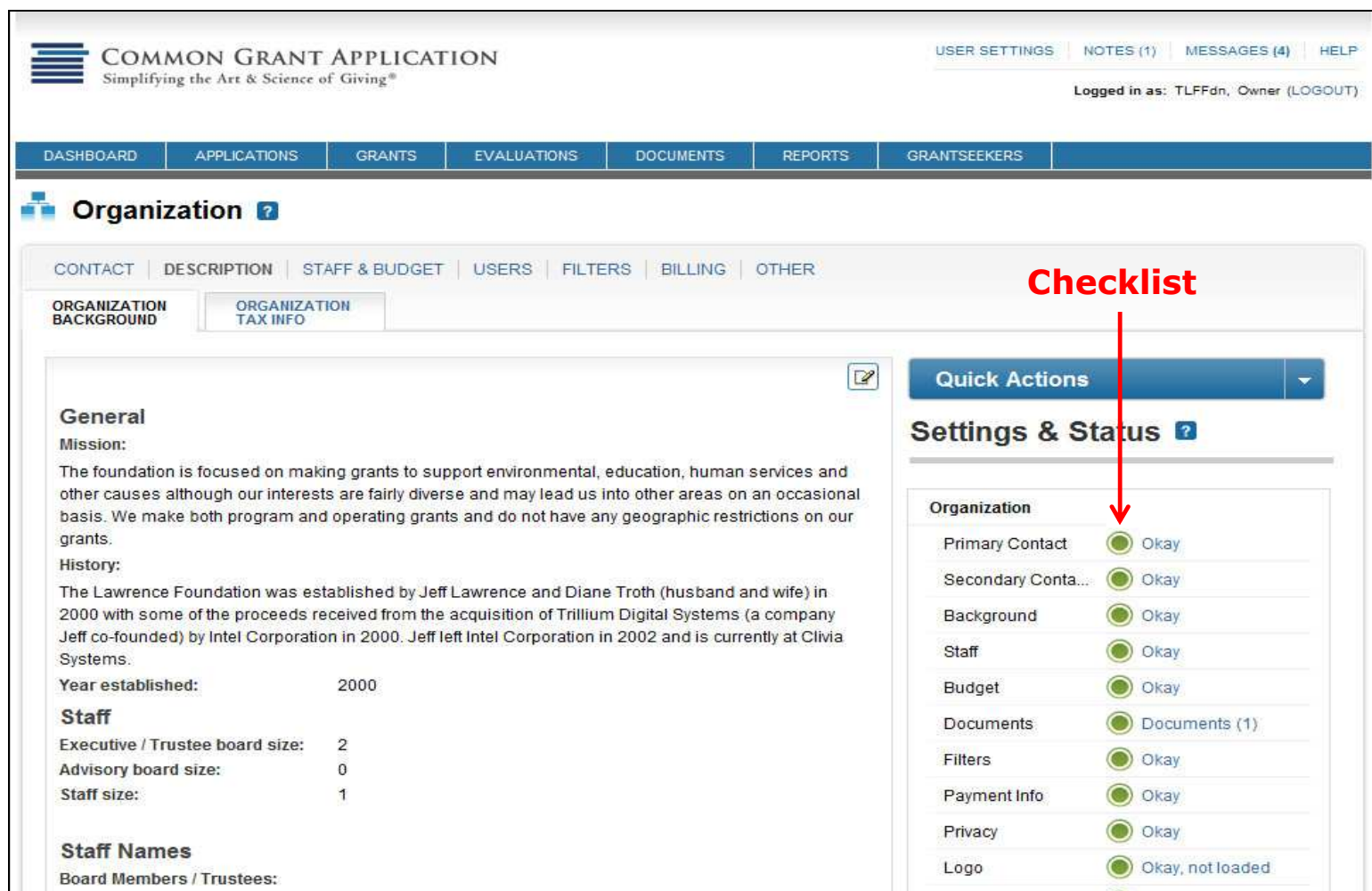
Address 2:

City: \* Los Angeles

Showing the grantseeker's step-by-step process



# Grantmaker Dashboard Organization Detail



**Checklist**

**Quick Actions**

**Settings & Status**

**Organization**

- Primary Contact ● Okay
- Secondary Conta... ● Okay
- Background ● Okay
- Staff ● Okay
- Budget ● Okay
- Documents ● Documents (1)
- Filters ● Okay
- Payment Info ● Okay
- Privacy ● Okay
- Logo ● Okay, not loaded

**General**

**Mission:**  
The foundation is focused on making grants to support environmental, education, human services and other causes although our interests are fairly diverse and may lead us into other areas on an occasional basis. We make both program and operating grants and do not have any geographic restrictions on our grants.

**History:**  
The Lawrence Foundation was established by Jeff Lawrence and Diane Troth (husband and wife) in 2000 with some of the proceeds received from the acquisition of Trillium Digital Systems (a company Jeff co-founded) by Intel Corporation in 2000. Jeff left Intel Corporation in 2002 and is currently at Clivia Systems.

Year established:	2000
-------------------	------

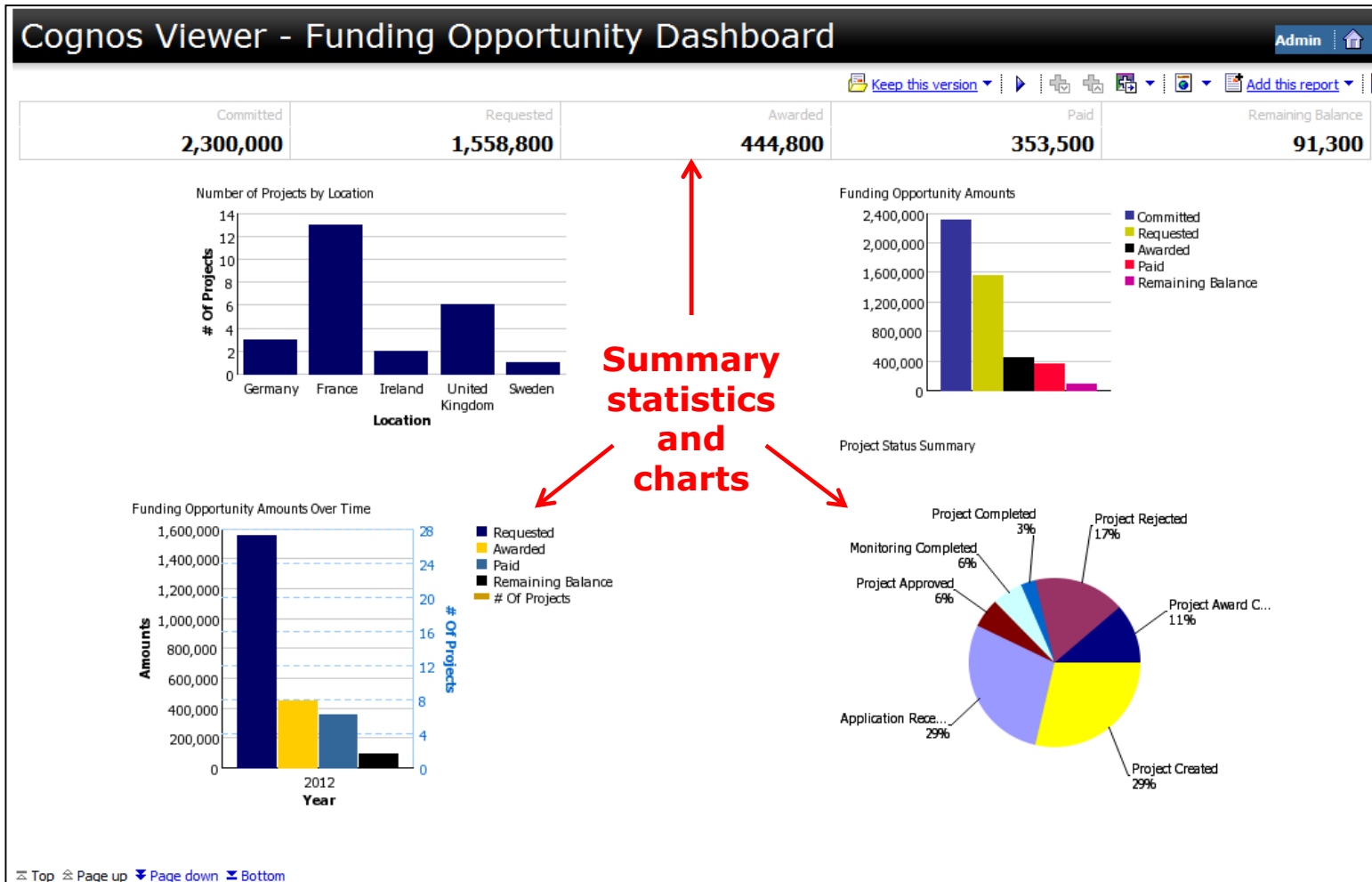
**Staff**

Executive / Trustee board size:	2
Advisory board size:	0
Staff size:	1

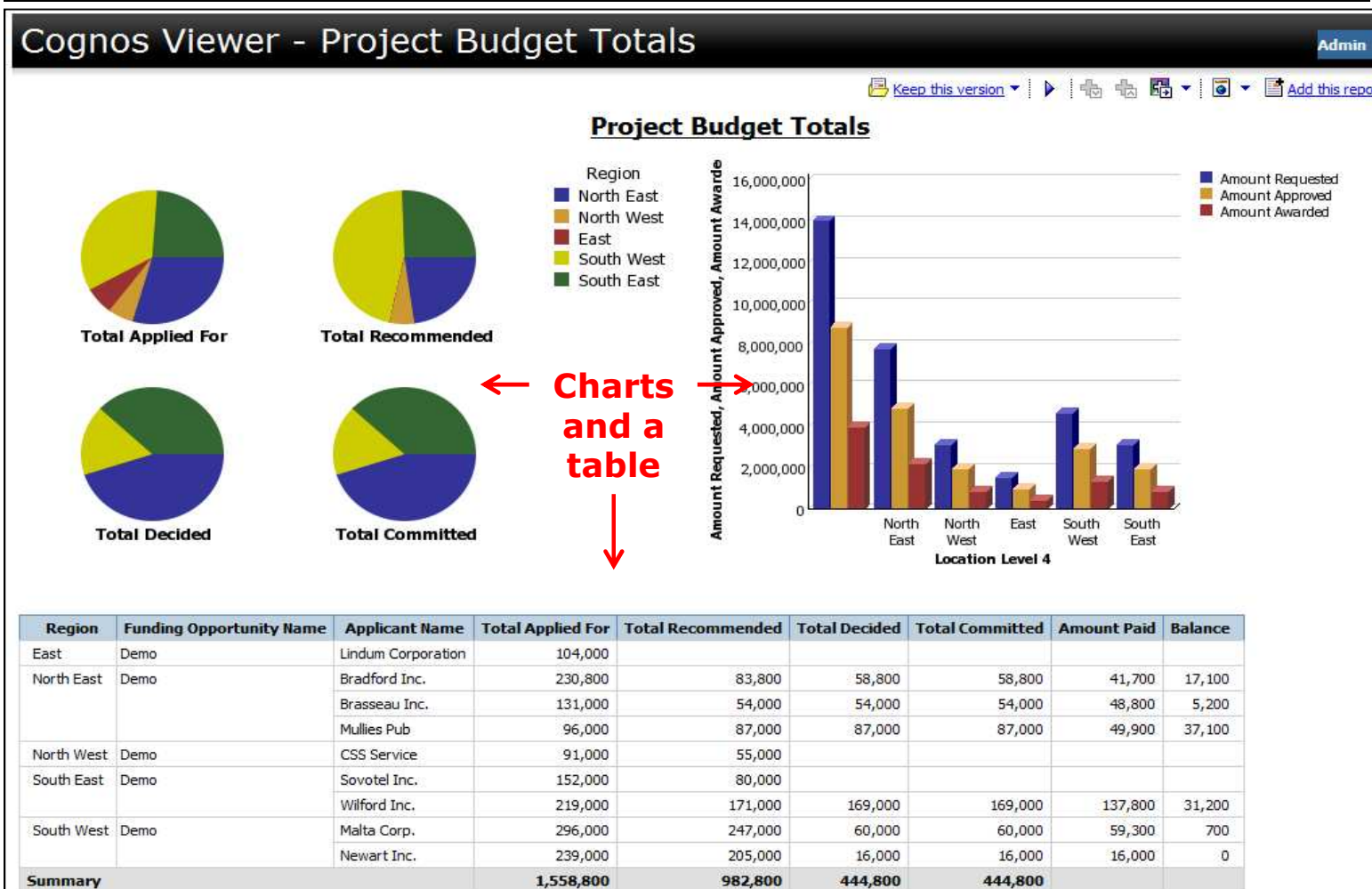
**Staff Names**

Board Members / Trustees:

# Funding Opportunity Dashboard



# Project Budget Totals



# Chart, Summary, Table and Pie

Welcome, Maureen Cooke | Manage Your Profile | Access Sandbox | Help | Sign Out

Main Dashboard Reports Surveys Mail Budget Resource Admin Forum Employee Giving Volunteer Events Search

Grant Manager Executive [Export to PDF](#)

**AT A GLANCE GIVING** BUDGET CASH FLOW GLOBAL FUNDING MAP

Refine Your Results

### Portfolio Cash Flow

### YTD Giving Statistics

<b>\$310,625</b> Amount Paid	<b>\$1,011,241</b> Employee Contribution
<b>1,666</b> Hours Submitted	<b>\$175,023</b> Amount Pledged

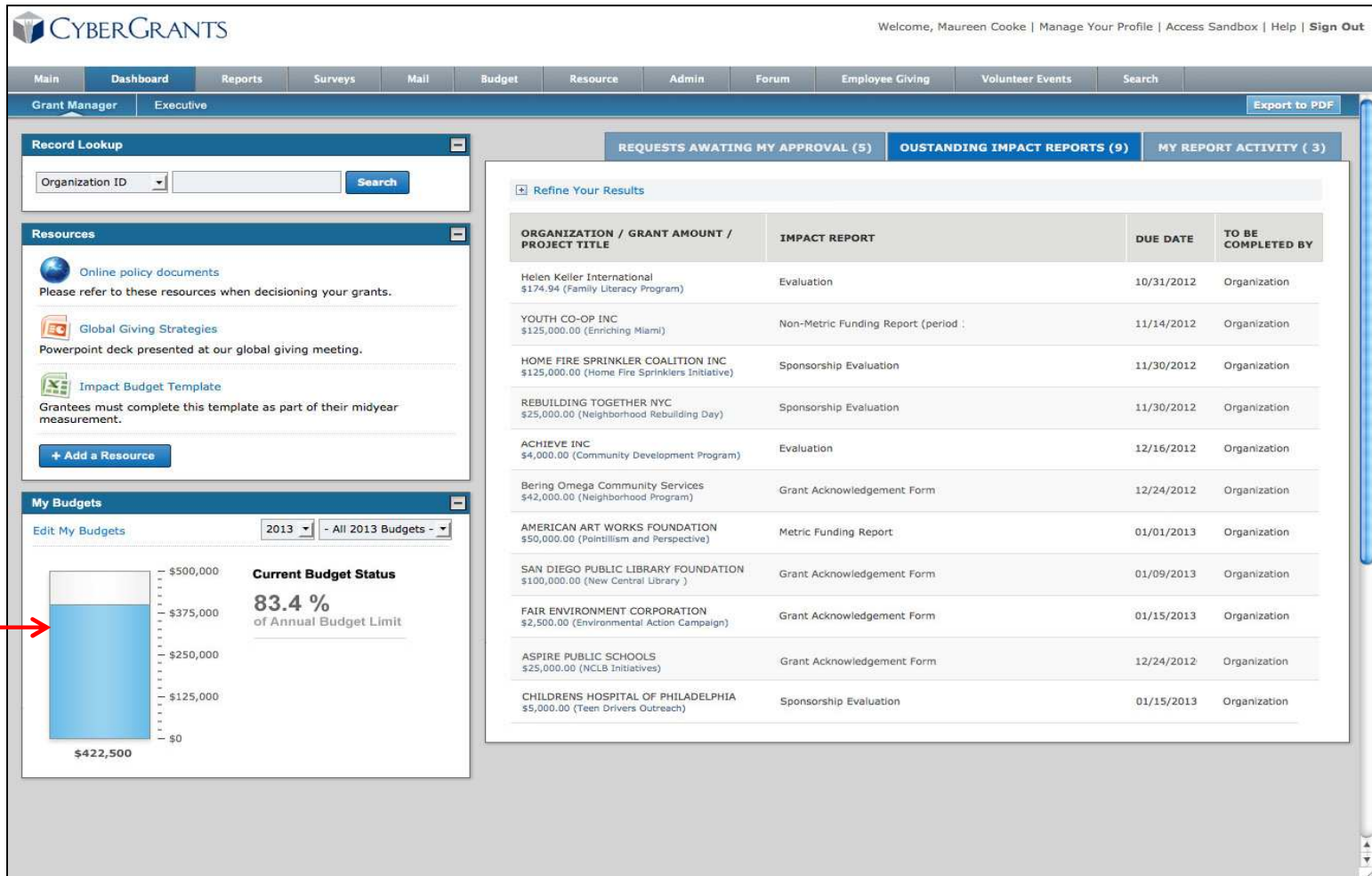
### Program Overview

PROPOSAL TYPE	AMOUNT PAID	HOURS SUBMITTED	EMPLOYEE CONTRIBUTION	AMOUNT PLEDGED
Dollars for Doers	\$750	763	\$0	\$0
Matching Gifts	\$875		\$1,000,010,125	\$0
Event Manager Logging Hours	\$0	903		\$0
Event Sponsorship	\$25,000	0	\$0	\$0
Grant Application	\$5,000	0	\$0	\$0
International Matching Gifts	\$0		\$266	\$0
Political Action Committee	\$0		\$850	\$0
Sign up a team	\$0			\$0
Sign up yourself	\$0			\$0

### % Paid by Program Name

**Multiple charts and statistical formats**

# Record Lookup, Resources, Budget Chart and Table



Welcome, Maureen Cooke | Manage Your Profile | Access Sandbox | Help | Sign Out

Main Dashboard Reports Surveys Mail Budget Resource Admin Forum Employee Giving Volunteer Events Search

Grant Manager Executive [Export to PDF](#)

**Record Lookup**

Organization ID  [Search](#)

**Resources**

- Online policy documents  
Please refer to these resources when decisioning your grants.
- Global Giving Strategies  
Powerpoint deck presented at our global giving meeting.
- Impact Budget Template  
Grantees must complete this template as part of their midyear measurement.

[+ Add a Resource](#)

**My Budgets**

Edit My Budgets 2013 - All 2013 Budgets -

**Current Budget Status**

83.4 % of Annual Budget Limit

\$422,500

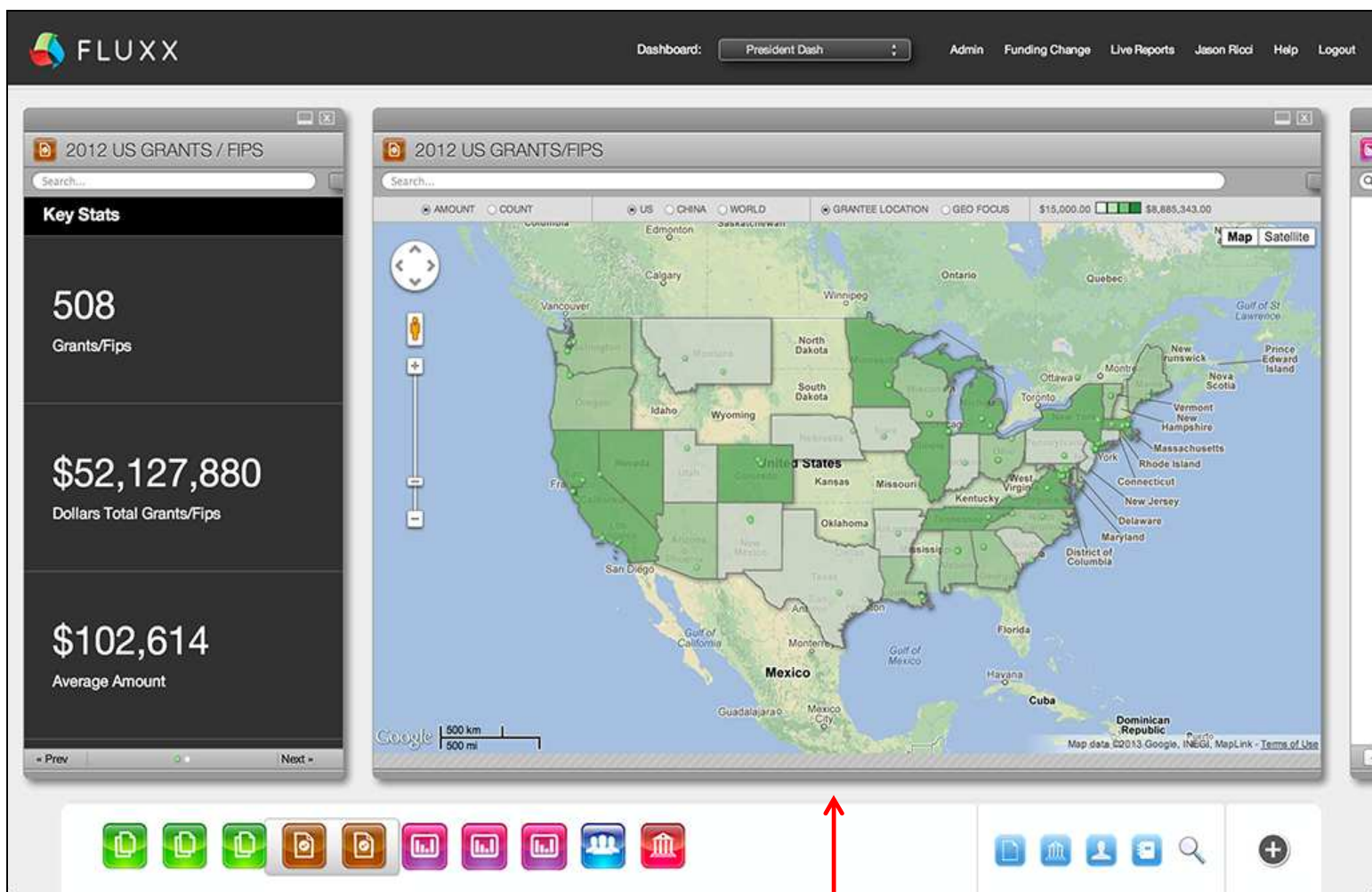
**REQUESTS AWAITING MY APPROVAL (5) | OUTSTANDING IMPACT REPORTS (9) | MY REPORT ACTIVITY (3)**

2 Refine Your Results

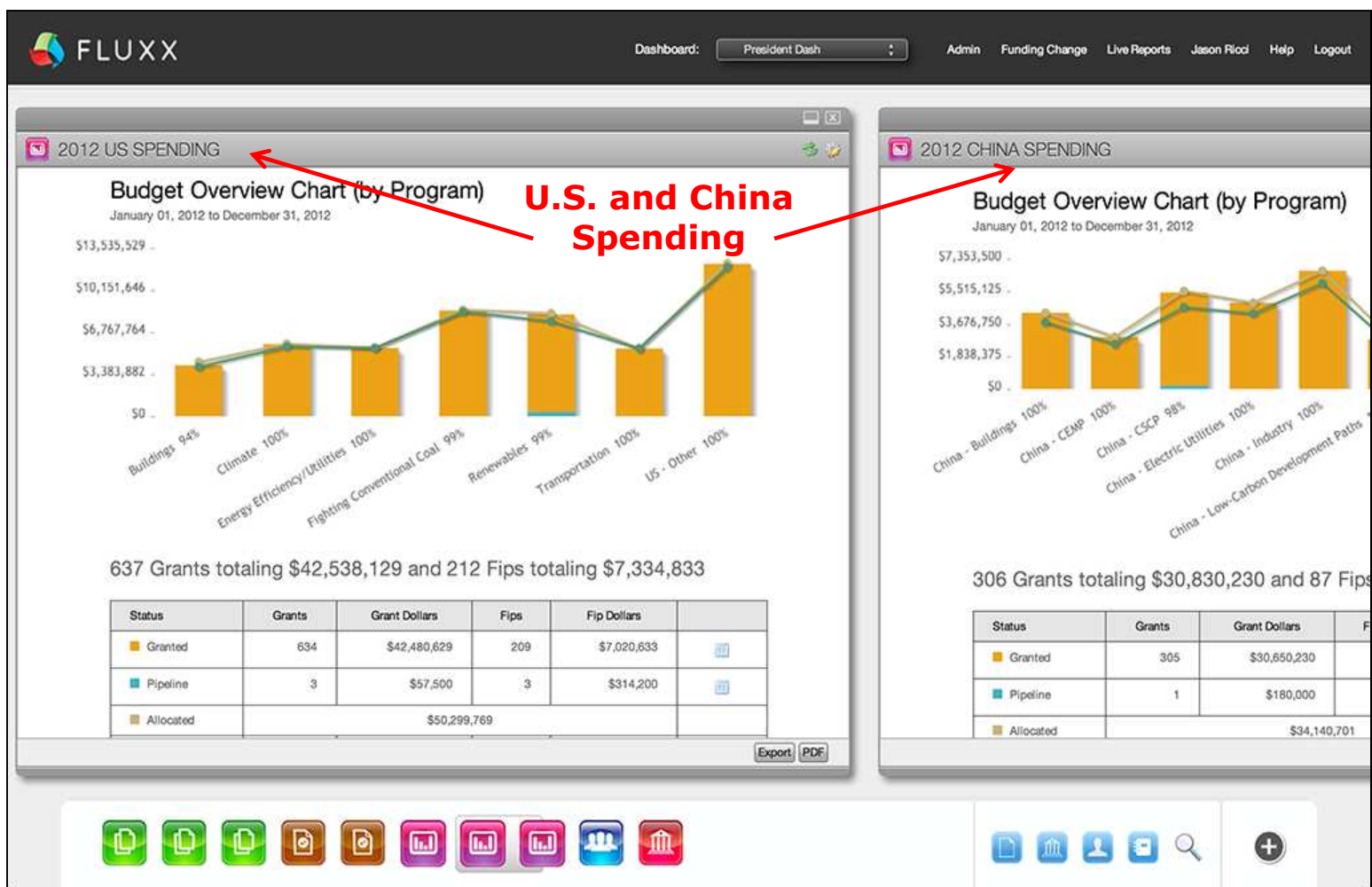
ORGANIZATION / GRANT AMOUNT / PROJECT TITLE	IMPACT REPORT	DUE DATE	TO BE COMPLETED BY
Helen Keller International \$174.94 (Family Literacy Program)	Evaluation	10/31/2012	Organization
YOUTH CO-OP INC \$125,000.00 (Enriching Miami)	Non-Metric Funding Report (period :	11/14/2012	Organization
HOME FIRE SPRINKLER COALITION INC \$125,000.00 (Home Fire Sprinklers Initiative)	Sponsorship Evaluation	11/30/2012	Organization
REBUILDING TOGETHER NYC \$25,000.00 (Neighborhood Rebuilding Day)	Sponsorship Evaluation	11/30/2012	Organization
ACHIEVE INC \$4,000.00 (Community Development Program)	Evaluation	12/16/2012	Organization
Bering Omega Community Services \$42,000.00 (Neighborhood Program)	Grant Acknowledgement Form	12/24/2012	Organization
AMERICAN ART WORKS FOUNDATION \$50,000.00 (Pointillism and Perspective)	Metric Funding Report	01/01/2013	Organization
SAN DIEGO PUBLIC LIBRARY FOUNDATION \$100,000.00 (New Central Library )	Grant Acknowledgement Form	01/09/2013	Organization
FAIR ENVIRONMENT CORPORATION \$2,500.00 (Environmental Action Campaign)	Grant Acknowledgement Form	01/15/2013	Organization
ASPIRE PUBLIC SCHOOLS \$25,000.00 (NCLB Initiatives)	Grant Acknowledgement Form	12/24/2012	Organization
CHILDRENS HOSPITAL OF PHILADELPHIA \$5,000.00 (Teen Drivers Outreach)	Sponsorship Evaluation	01/15/2013	Organization

A chart of the current budget status

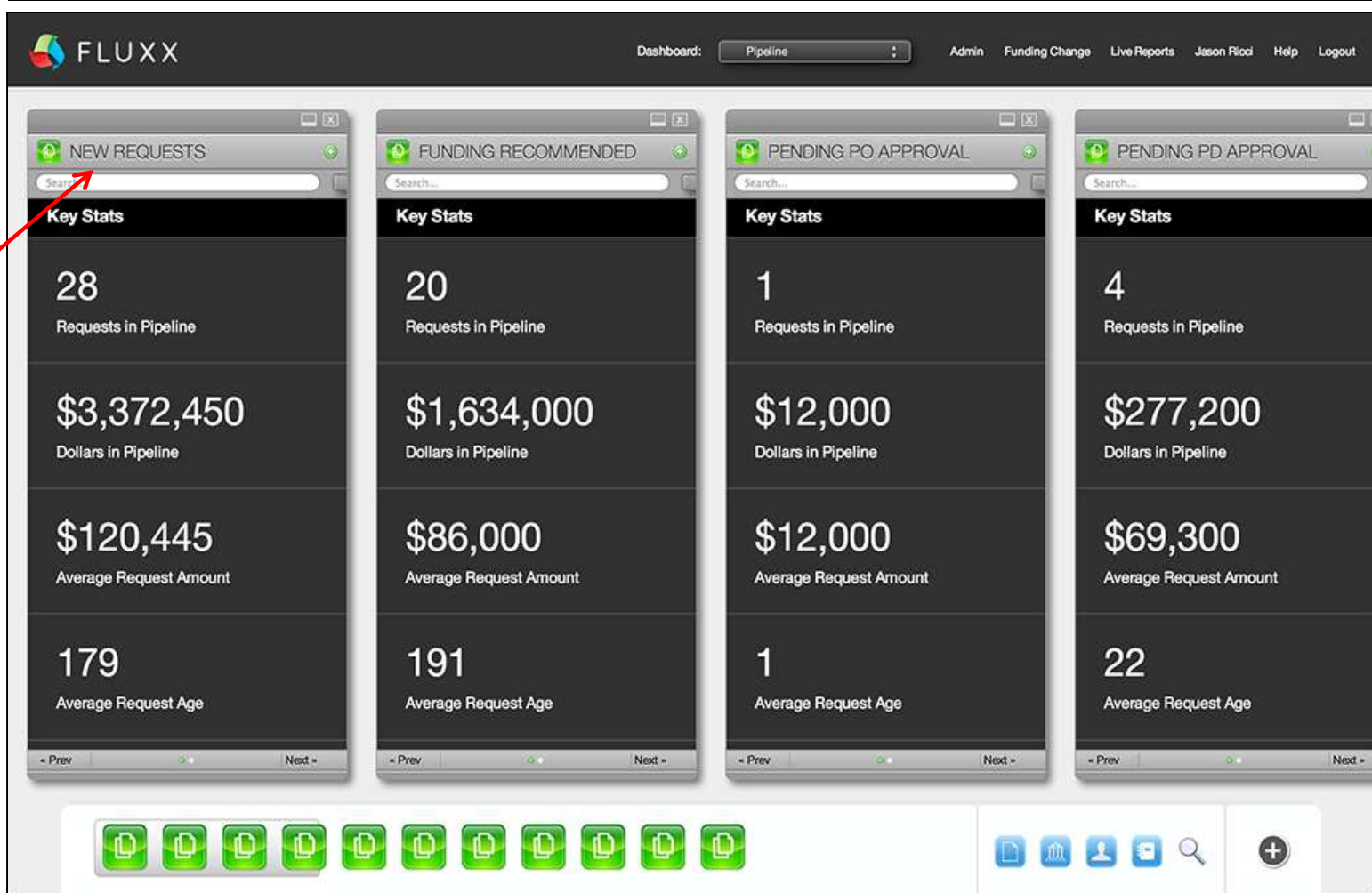
# Key Grant Statistics Linked to Drill-down Google Map



# Budget Overview by Program



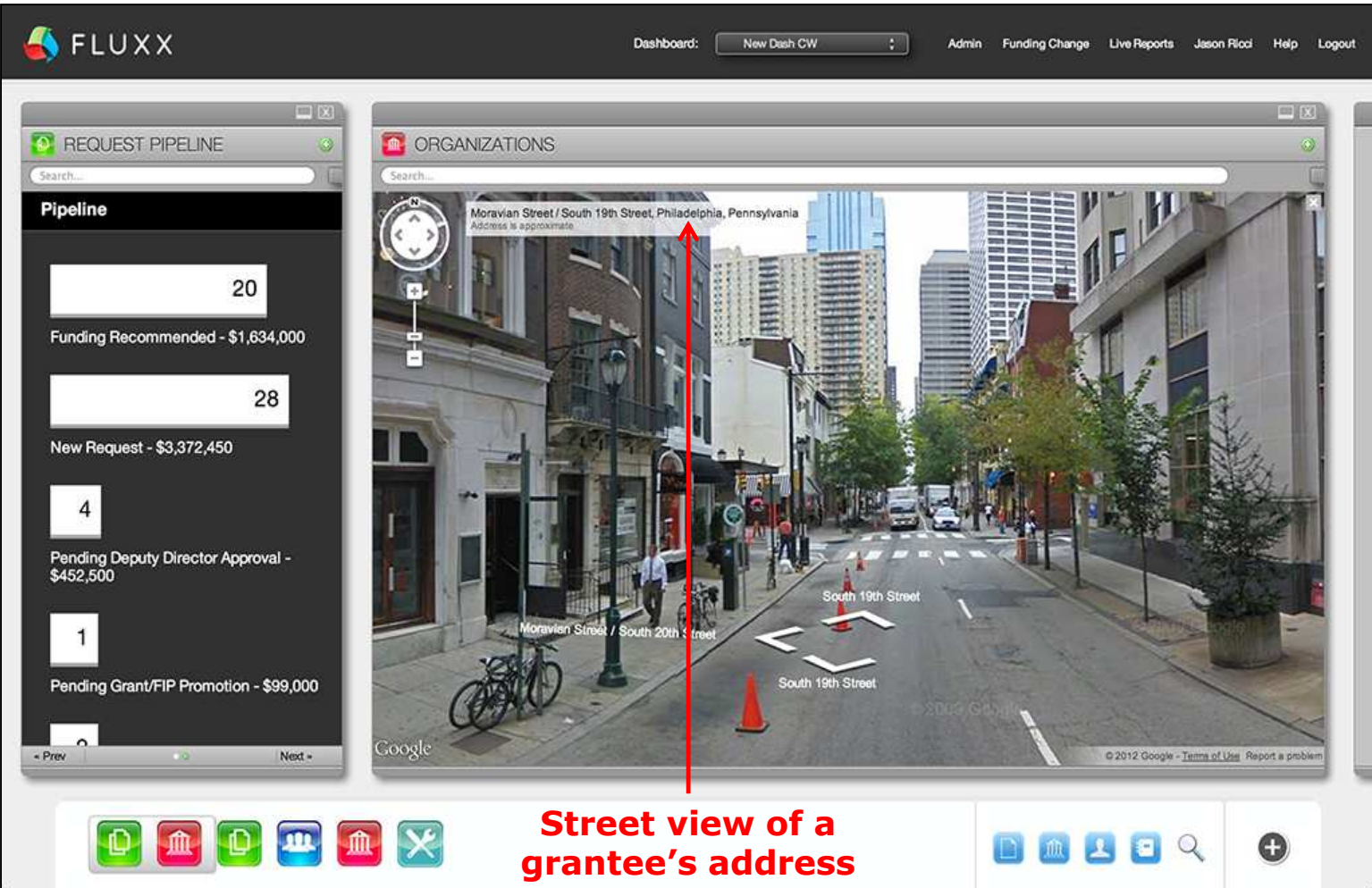
# Summary Statistics Dashboard View



**Multiple cards each with different data**



# Request Pipeline and Google Street View of Addressee



The screenshot displays the FLUXX dashboard interface. On the left, the 'REQUEST PIPELINE' widget shows a list of request stages with counts and funding amounts:

- 20 (Funding Recommended - \$1,634,000)
- 28 (New Request - \$3,372,450)
- 4 (Pending Deputy Director Approval - \$452,500)
- 1 (Pending Grant/FIP Promotion - \$99,000)


On the right, the 'ORGANIZATIONS' widget displays a Google Street View of a city street. A red arrow points to a specific building on the left side of the street. The address label above the arrow reads: 'Moravian Street / South 19th Street, Philadelphia, Pennsylvania'. Other street labels visible include 'Moravian Street / South 20th Street', 'South 19th Street', and 'South 19th Street'. The bottom of the dashboard features a row of icons for various functions.

**Street view of a grantee's address**

# Administrator View of Assigned Grant Follow Ups



National Trust for Historic Preservation Marla Collum



**National Trust for Historic Preservation**  
Save the past. Enrich the future.™

**requests**  
Dashboard  
Apply

**grants**  
Dashboard  
Payment Tracking

**search**  
Requests  
Decisions  
GuideStar

**communications**  
Email Templates  
Email Attachments  
Mail Merge Templates

**contacts**  
Organizations  
Users

**reporting**  
Export Data  
Reports

**process**  
Process Manager  
Form Builder  
Report Field Templates

**tools**  
Fax to File  
Help

**FollowUps Draft** Partners in Preservation: T

FORM NAME	ORGANIZATION	ASSIGNED TO	PROJECT	DUE DATE
Partners in Preservation Twin Cities - Interim Report	<a href="#">Emerge Community Development</a>	Lisa Kugler	<a href="#">Emerge Career And Technology Center</a>	10/15/2012
Partners in Preservation Twin Cities - Final Report	<a href="#">Township of Waterford</a>	Liz Messner	<a href="#">Restoring The Iron Bridge - The Path Where The Past And The Future Meet</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Christ on Capitol Hill</a>	Gary Dreier	<a href="#">Christ Lutheran Church On Capitol Hill Column And Historical Exterior Preservation</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">The Soap Factory</a>	Ben Heywood	<a href="#">Masonry Work At The Soap Factory</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">American Swedish Institute</a>	Christy Stolpestad	<a href="#">"Heart Of The Home": American Swedish Institute's Turnblad Castle Renovations</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Czech and Slovak Sokol Minnesota</a>	Joe Landsberger	<a href="#">Preserve the 19th Century CSPS Hall: Create a 21st Century Historic Theatre</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Emerge Community Development</a>	Lisa Kugler	<a href="#">Emerge Career And Technology Center</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">City of Mendota Heights</a>	Jake Sedlacek	<a href="#">Pilot Knob Restoration</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Tubman</a>	Mary Durand	<a href="#">Healing &amp; History Center: The Legacy Of Strength And Simplicity</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Minnesota State Fair Foundation</a>	Kay Cady	<a href="#">Minnesota State Fair Grandstand</a>	7/31/2013
Partners in Preservation Twin Cities - Final Report	<a href="#">Hennepin County</a>	Carol Anderson	<a href="#">Fort Snelling Building 67 Tower Clock</a>	9/1/2013

**Provides drill down**

# Organization Summary with Link to GuideStar Charity Check



Print Organization Packet

Summary: Arcadia Historical and Preservation Society

10101 N. Choctaw Rd.  
Luther, OK 73054  
USA

Website: [www.arcadiaroundbarn.org](http://www.arcadiaroundbarn.org)

Phone Number: 405 277 3426  
Tax ID: 73-1318911  
Last Updated: 12/6/2012

Primary Contact:

Edit

Contacts: 2

PRIMARY	NAME	TITLE	EMAIL	PHONE
<input type="radio"/>	Sam Gillaspy	President, Arcadia Historical and Preservation Society		405 277 3426
<input type="radio"/>	Ann Boulton Young	Conservator	<a href="mailto:aboulton@aol.com">aboulton@aol.com</a>	405 330 9933

Add Contact

Inactive Contacts: 0

Application and Grant History

DATE	PROCESS	PROJECT	TYPE	STATUS	GRANTED	PAID
11/9/2011	Southwest - National Trust Preservation Funds	Preservation Plan for Brooks Building and First...	One Time	Follow Up Complete	4,000.00	4,000.00
<b>TOTALS:</b>					<b>\$4,000.00</b>	<b>\$4,000.00</b>

Enter Grant

GuideStar Charity Check: Generated on January 23, 2013 at 19:29 EST

**ARCADIA HISTORICAL & PRESERVATION SOCIETY**  
PO Box 134  
Arcadia OK 73007

IRS Pub 78 Not Verified

IRS BMF 509(a)(2)

GUIDESTAR Charity Check

GuideStar Charity Check

Generated on January 23, 2013 at 19:29 EST

# What's New, Alerts, Asset Summary, Distributions, Quick Links, Grants and Tax Center


Welcome, Fred Smith Demo

How are we doing today? ☆☆☆☆☆

Classic View Customize


### What's New

Webinars for Foundation Source Clients  
Click [here](#) to find out about upcoming webinars on a variety of philanthropic topics. You can also access recordings of past webinars.



The Harvest Family Foundation honors the legacy of its founders who envisioned their best contribution to a healthy society the protection of children and the environment, and supporting medical research.

### Photo Album



### Today's Alerts

[Requests to review](#) (3)  
[Annual Tax Questionnaire](#)  
[Results to review](#) (1)  
[Results past due](#) (4)  
[Results to request](#) (2)

### Quick Links

[Make A Grant](#) [Find A Charity](#)  
[Community Pulse Page](#) [Advanced Services](#)

[Edit Notes >](#)

1. Review upcoming conference schedule; discuss with Rob and Ellie.
2. Circulate recent blog about impact investments to Terri and Barbara.
3. Touch base with board

### Asset Summary

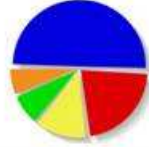
Cash Balance	\$3,632,662.30
Securities	\$7,184,687.15
Alternative Assets	\$871,370.00
<b>Total Assets in Foundation</b>	<b>\$11,688,719.45</b>
Transactions in Process	\$12,500.00
Future Grants	\$57,500.00
<b>Total Available Assets</b>	<b>\$11,818,719.45</b>

### Grants By Category

2012 2013

Show by % Show by \$


OTHER	50%
INDIVIDUALS	22%
COMMUNITY	13%
ENVIRONMENT	8%
EDUCATION	7%



### Distribution Requirements by Dec 31, 2013

[View Details](#)

Estimated Distribution	\$764,948.58
Qualified Distributions	-12,500.00
Scheduled Payments	-34,000.00
Recommended Additional Distribution	15,300.00
<b>Estimated Distribution Remaining</b>	<b>\$733,748.58</b>



### Tax Center

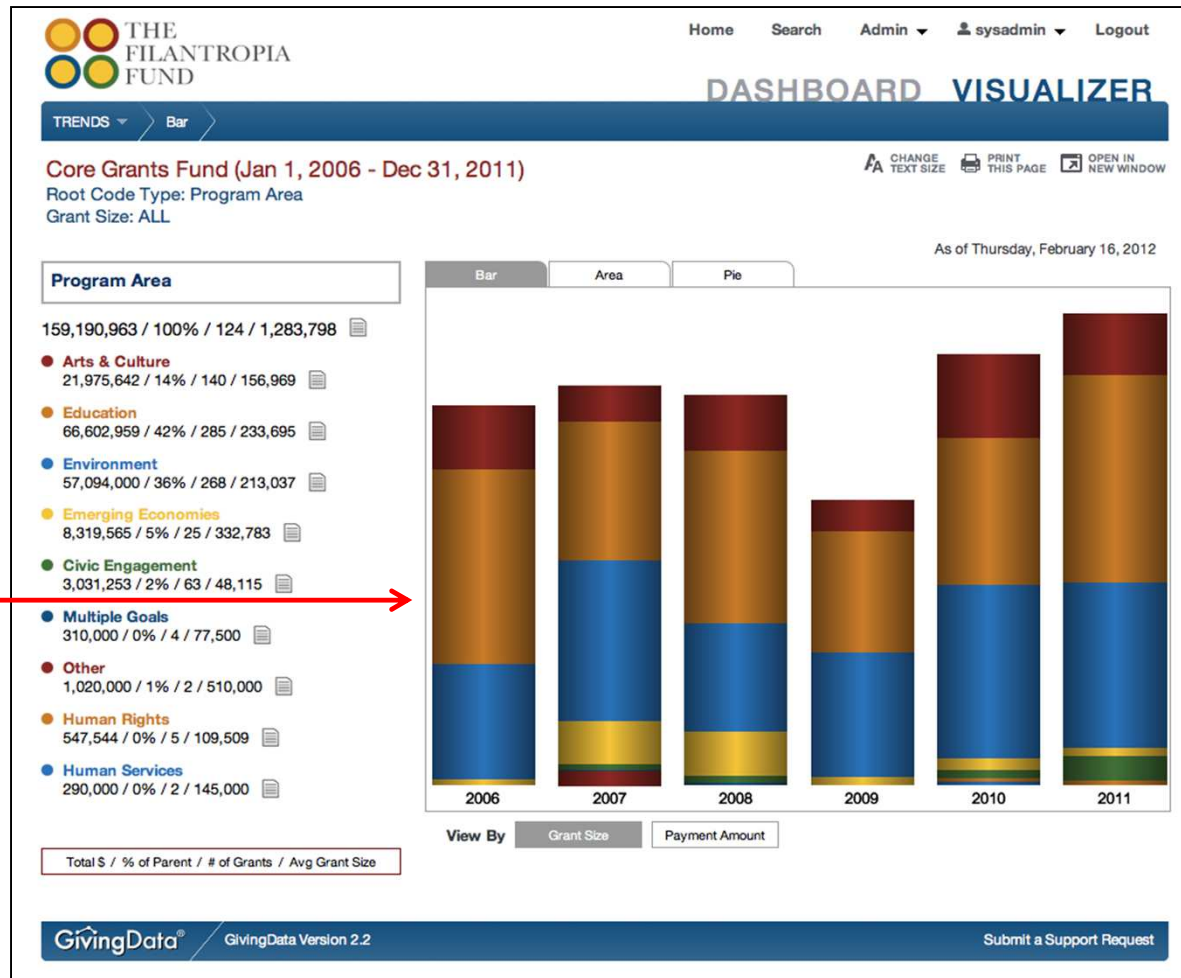
Please [click here](#) to complete your foundation's annual tax questionnaire. Once submitted, we will begin preparation of your foundation's return and determine whether follow-up is necessary.

Questions? Contact your Private Client Advisor, Dawn Harpin, by clicking [Contact Us](#) or calling (800) 839-1754.

Both a chart and different data formats

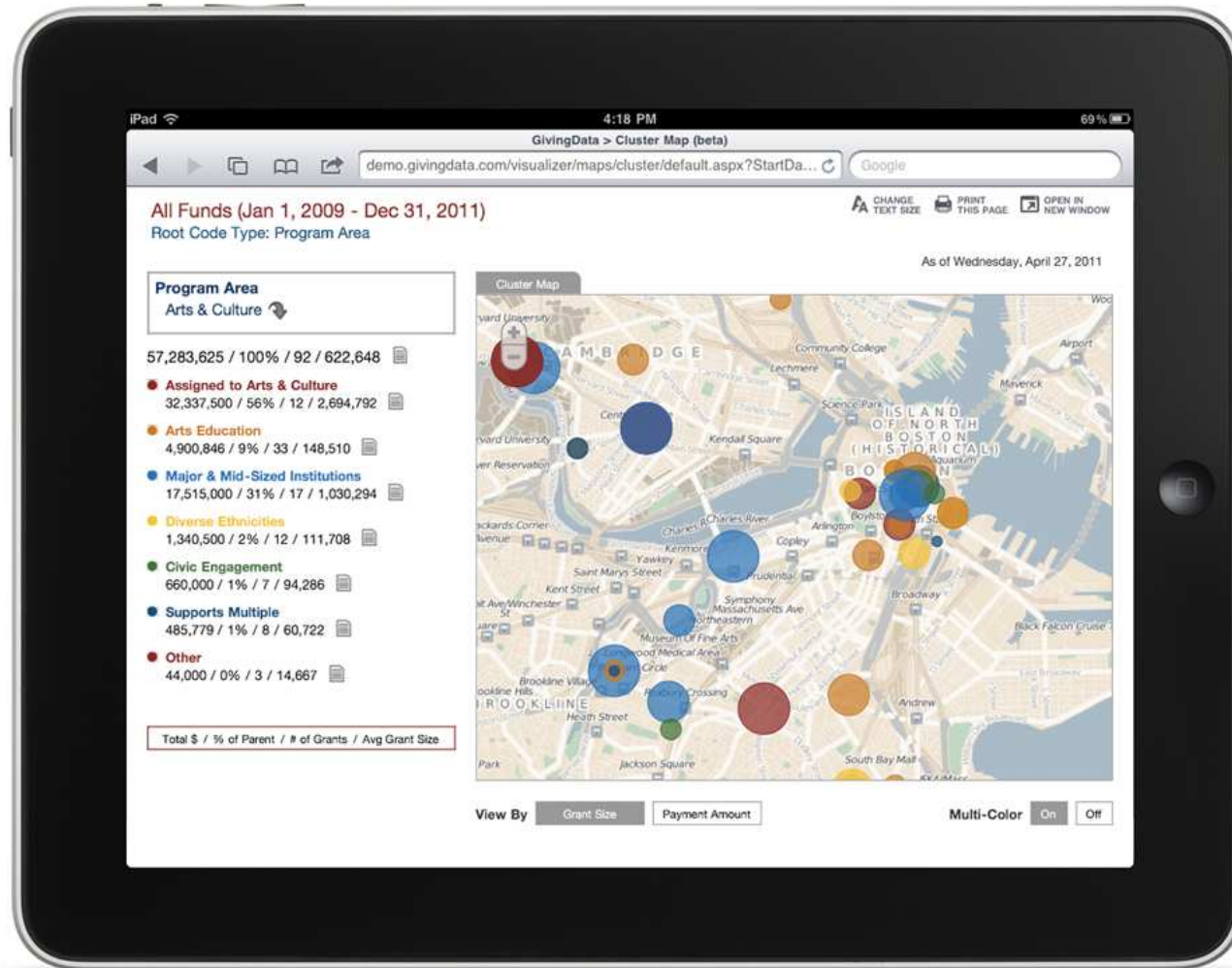
# Dashboard Visualizer of Core Grants

**A drill-down digital dashboard accessing an organization's grant data**



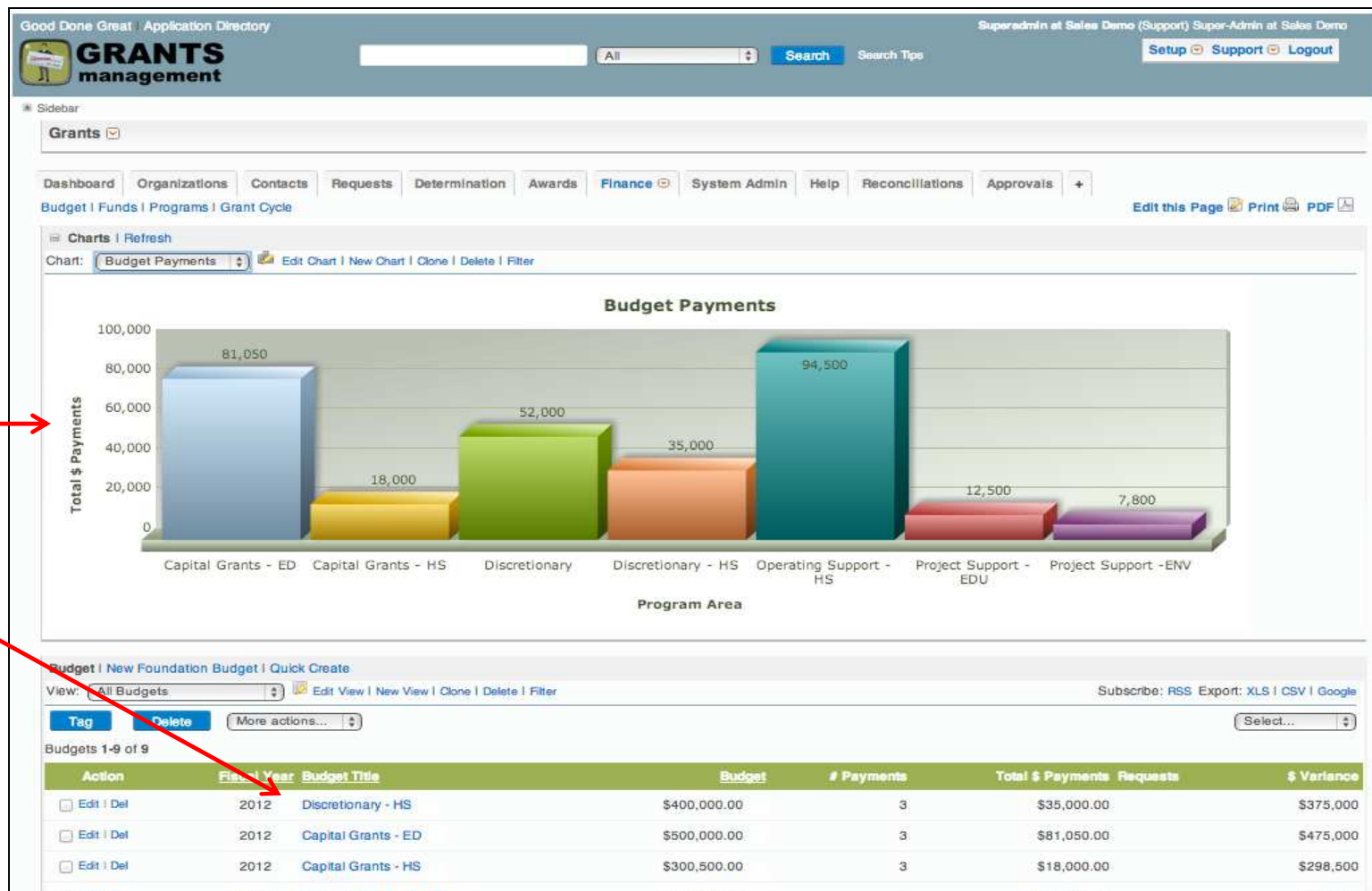
# Program Area Map on an iPad

**Grant data displaying on an Apple iPad** →





# Budget Payments Chart and Table

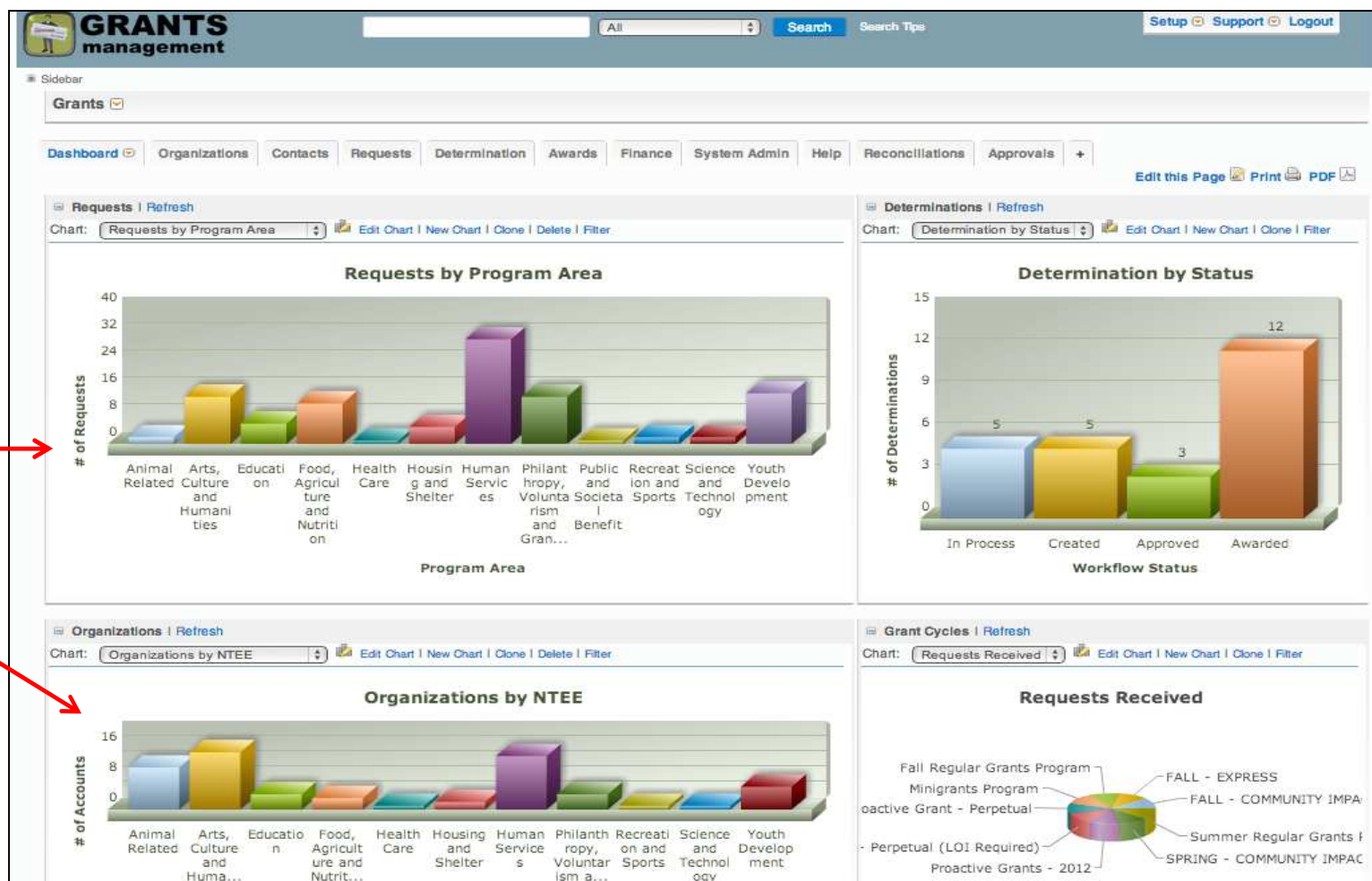


A bar chart and a table with drill down capability



# Requests by Program, Status, NTEE Coding, and Requests Received

Multiple charts with different types of data





# Quick Views, Tools, To Do, and Summary Data



Colors highlight different status types

**GrantRight** | To do | 45 records

Find requests

Quick views: All, To do, Unreviewed, Pending, Planned, Declined, Approved, Cancelled

Tools: Summary, Search/Export, Reports, Enter request, Organization history, Weekly to do, Admin, Budget, Users

Ref #	Status	Submitted	Name of organization	Name of project	Assigned to
2013010006	Pending	Jan 03, 2013	Advocates for Homeless Fami...	Ping Pong Tourney 2013	Monique MacD...
2013010005	Pending	Jan 03, 2013	Size of a Mustard Seed	Sowing the Seeds Project	Monique MacD...
2013010003	Pending	Jan 02, 2013	Toronto Educational Opportu...	Breakfast for All program	Matthew Fawcett
2013010002	Approved	Jan 01, 2013	Growth Council of Oxford Hills	Let's make a difference	Jane Doe
2013010001	Approved	Jan 01, 2013	Grace and Growth Counselinn	General Support	Monique MacDo...

Summary - 2013

Region: All

Donations by focus

Focus	Percentage
Arts / Culture	48.1%
Health / Welfare	23.3%
Environmental	22.3%
Community / Civic	6.4%

Month	Pending	Unpaid
Last year (2012)	12	22
January	3	1
February	0	1
March	0	0
April	0	5
May	0	0
June	0	0
July	0	0
August	0	0
September	0	2
October	0	1
November	0	0
December	0	1
Totals (2013)	3	11
Next year (2014)	-	6

Summary page numbers include in-kind data, and excludes Employee Program data

# Review and Manage Grants

Ref #	Status	Submitted	Name of organization	Name of project	Assigned to
2013010006	Pending	Jan 03, 2013	Advocates for Homeless Fami...	Ping Pong Tourney 2013	Monique MacD...
2013010005	Pending	Jan 03, 2013	Size of a Mustard Seed	Sowing the Seeds Project	Monique MacD...
2013010003	Pending	Jan 02, 2013	Toronto Educational Opportu...	Breakfast for All program	Matthew Fawcett
2013010002	Approved	Jan 01, 2013	Growth Council of Oxford Hills	Let's make a difference	Jane Doe
2013010001	Approved	Jan 01, 2013	Grace and Growth Counseling	General Support	Monique MacDo

Request management

Region:

Business unit:

Focus:

Vendor #:

Assigned to:

Request status:

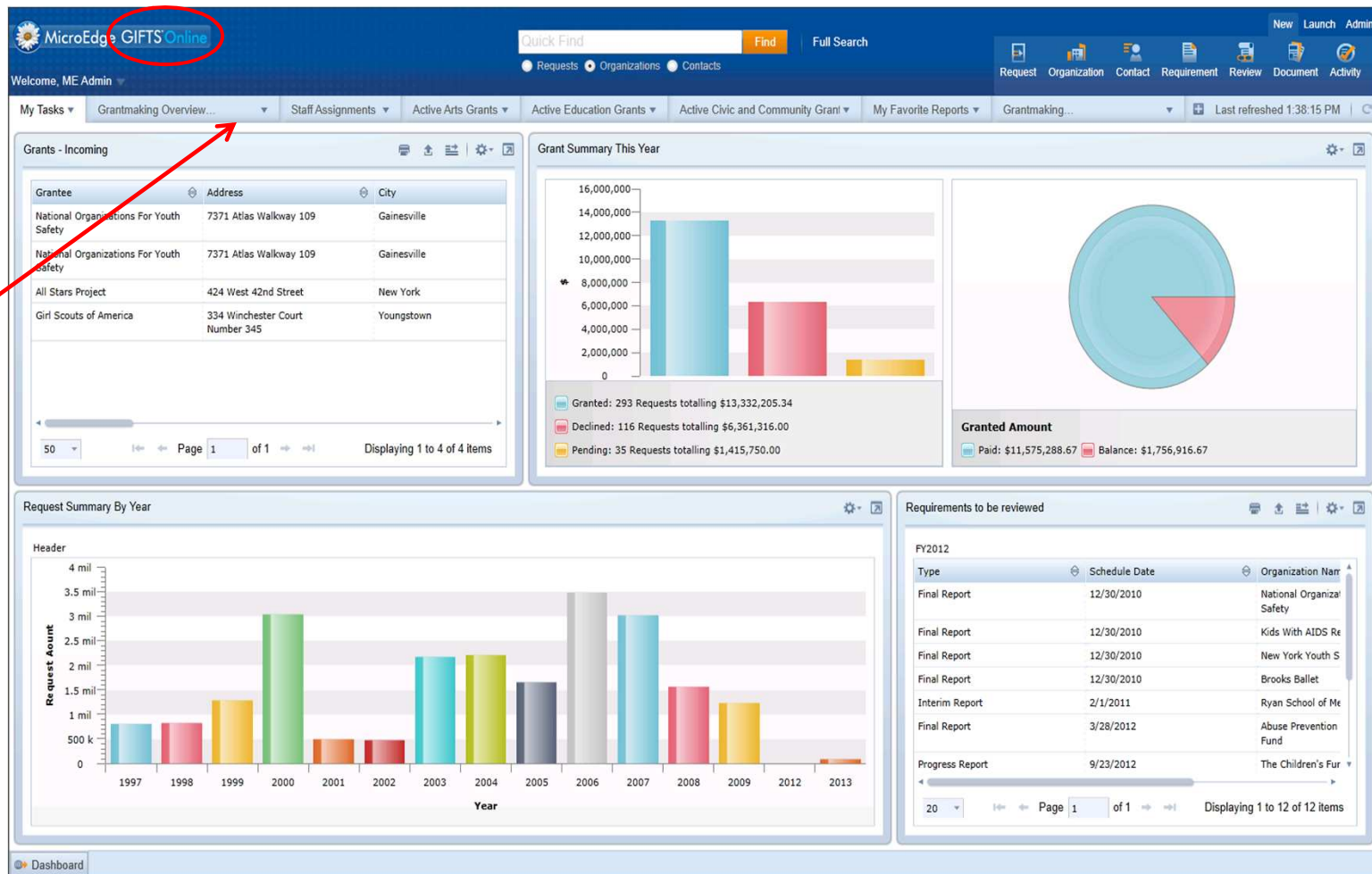
Process date:

Recommendations

Additional comments

**Flags can show the nationality of the grantee**

# Incoming Grants, Grant Summary, Request Summary and Requirements to Review



The screenshot displays the MicroEdge GIFTS Online dashboard. At the top, there is a navigation bar with a search function and tabs for Requests, Organizations, and Contacts. Below this is a 'My Tasks' section with dropdown menus for Grantmaking Overview, Staff Assignments, Active Arts Grants, Active Education Grants, Active Civic and Community Grant, and My Favorite Reports. The main content area is divided into four panels:

- Grants - Incoming:** A table listing grant recipients with columns for Grantee, Address, and City.
 

Grantee	Address	City
National Organizations For Youth Safety	7371 Atlas Walkway 109	Gainesville
National Organizations For Youth Safety	7371 Atlas Walkway 109	Gainesville
All Stars Project	424 West 42nd Street	New York
Girl Scouts of America	334 Winchester Court Number 345	Youngstown
- Grant Summary This Year:** A panel containing a bar chart showing request status (Granted, Declined, Pending) and a pie chart showing the distribution of granted amounts.
 

Summary statistics:

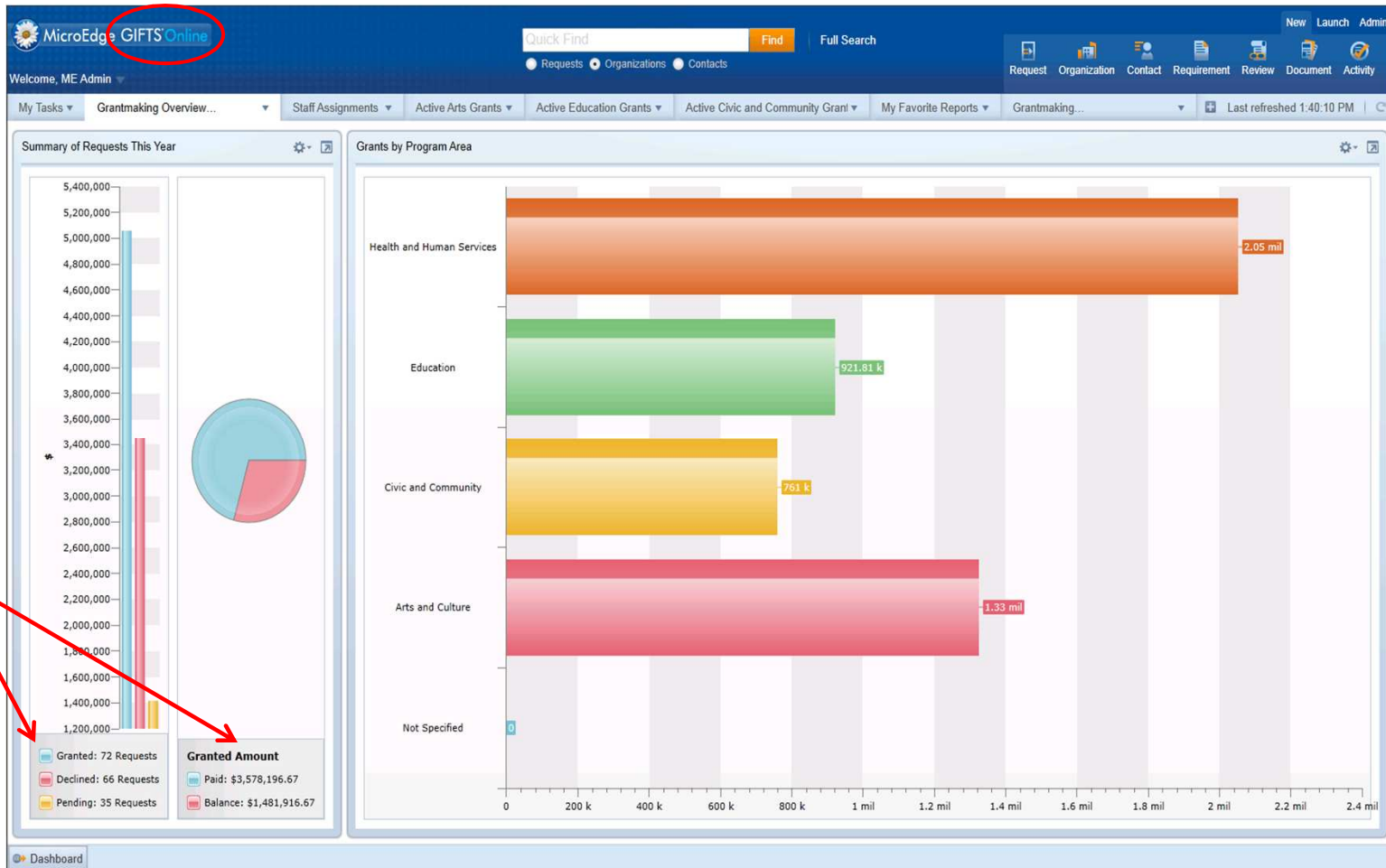
  - Granted: 293 Requests totalling \$13,332,205.34
  - Declined: 116 Requests totalling \$6,361,316.00
  - Pending: 35 Requests totalling \$1,415,750.00

Granted Amount: Paid: \$11,575,288.67; Balance: \$1,756,916.67
- Request Summary By Year:** A bar chart showing the request amount in millions from 1997 to 2013. The y-axis ranges from 0 to 4 million. The x-axis shows years from 1997 to 2013.
- Requirements to be reviewed:** A table listing requirements for FY2012 with columns for Type, Schedule Date, and Organization Name.
 

Type	Schedule Date	Organization Name
Final Report	12/30/2010	National Organiza Safety
Final Report	12/30/2010	Kids With AIDS Re
Final Report	12/30/2010	New York Youth S
Final Report	12/30/2010	Brooks Ballet
Interim Report	2/1/2011	Ryan School of Me
Final Report	3/28/2012	Abuse Prevention Fund
Progress Report	9/23/2012	The Children's Fur

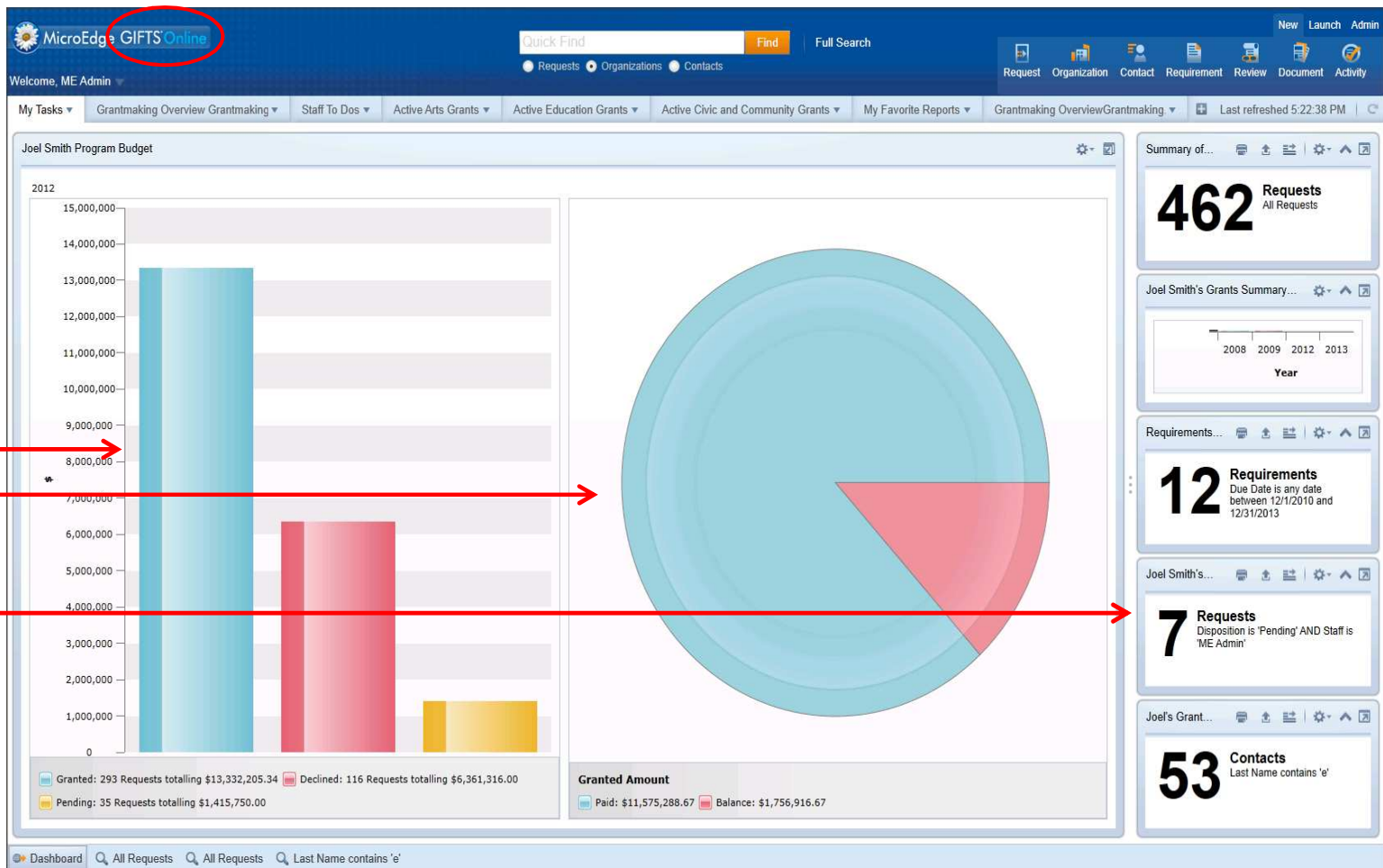
**A toolbar with 7 different dashboards**

# High Level Charts of Requests and Grants by Program



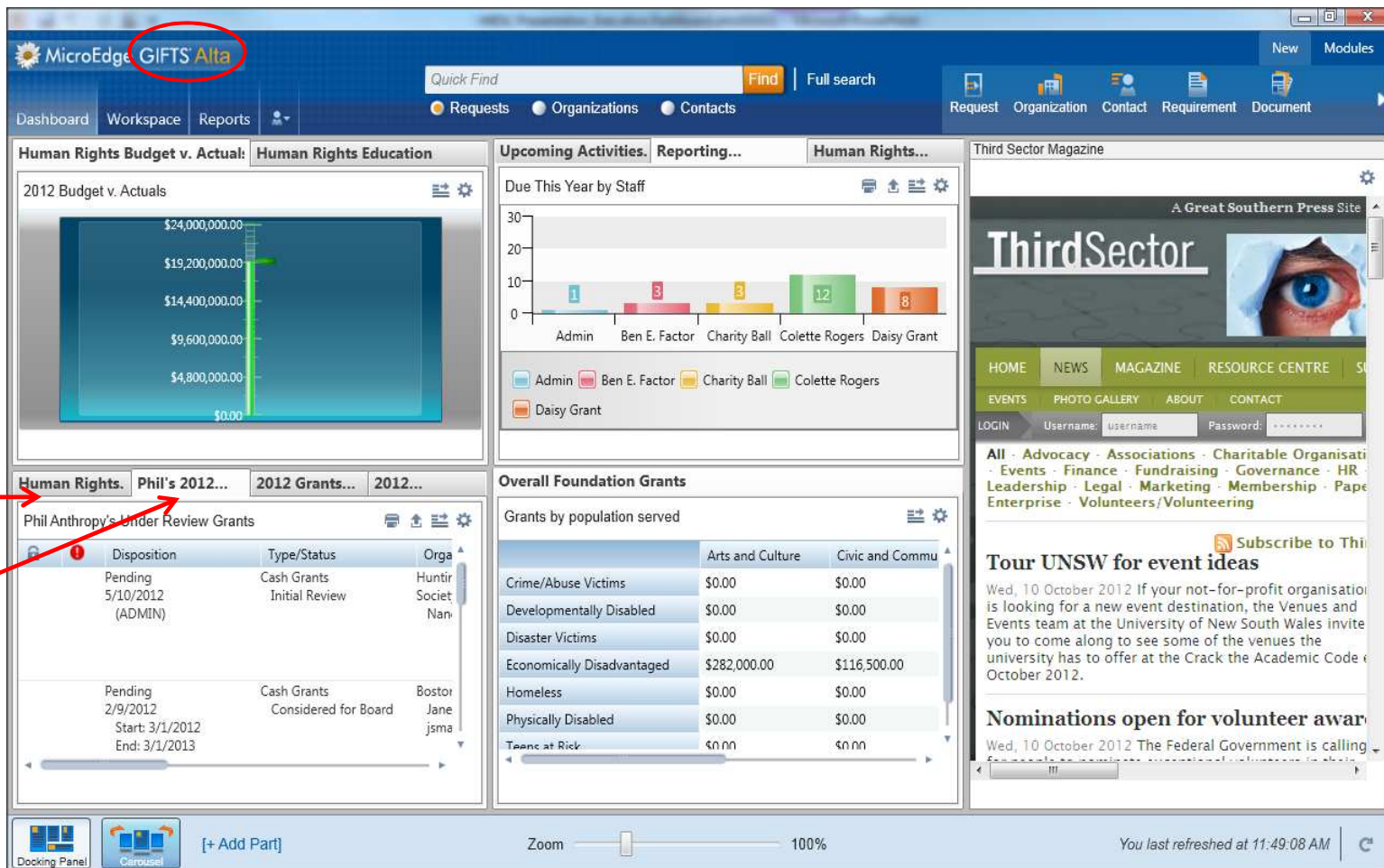
Combo of a bar and pie chart of Requests this year

# Program Budget and Summary Statistics



Multiple graphical parts and a summary section

# Grants Managers View



MicroEdge **GIFTS Alta**

Quick Find  Find Full search

Requests Organizations Contacts

Request Organization Contact Requirement Document

Human Rights Budget v. Actual: Human Rights Education

2012 Budget v. Actuals

Due This Year by Staff

Upcoming Activities Reporting... Human Rights...

Third Sector Magazine

Third Sector

HOME NEWS MAGAZINE RESOURCE CENTRE

EVENTS PHOTO GALLERY ABOUT CONTACT

LOGIN Username: Password: \*\*\*\*\*

All - Advocacy - Associations - Charitable Organisation - Events - Finance - Fundraising - Governance - HR - Leadership - Legal - Marketing - Membership - Paper Enterprise - Volunteers/Volunteering

Subscribe to This

Tour UNSW for event ideas

Nominations open for volunteer award

Phil Anthropy's Under Review Grants

Disposition	Type/Status	Orga
Pending 5/10/2012 (ADMIN)	Cash Grants Initial Review	Huntir Societ Nan
Pending 2/9/2012 Start: 3/1/2012 End: 3/1/2013	Cash Grants Considered for Board	Bostor Jane jsma

Grants by population served

	Arts and Culture	Civic and Commu
Crime/Abuse Victims	\$0.00	\$0.00
Developmentally Disabled	\$0.00	\$0.00
Disaster Victims	\$0.00	\$0.00
Economically Disadvantaged	\$282,000.00	\$116,500.00
Homeless	\$0.00	\$0.00
Physically Disabled	\$0.00	\$0.00
People at Risk	\$0.00	\$0.00

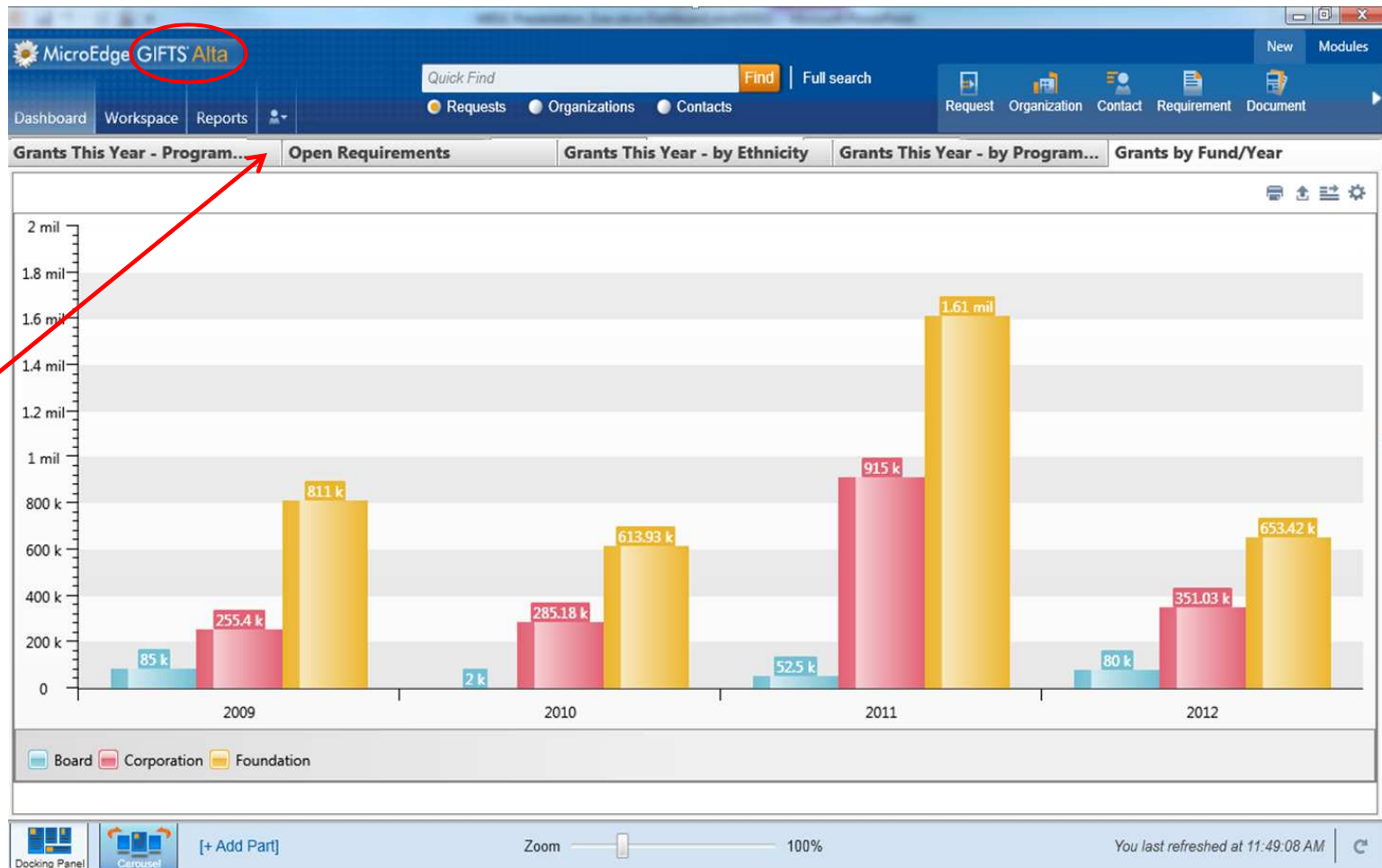
[+ Add Part]

Zoom 100%

You last refreshed at 11:49:08 AM

Each frame has multiple graphical part options

# Grants by Fund/Year



**A toolbar with 5 different views**

# Payment by Program, Pending Grant Reports, Budget Consumption

**Payments by Lead Program**

Sum of Contributing Program Amount (Thousands)

Lead Parent Program Area: Program	Amount (Thousands)
Arts & Culture	\$2,057.35
Community	\$4,240.75
Education	\$1,546.93
Health	\$522.50
<b>Total</b>	<b>\$8,367.53</b>

**Pending Grantee Reports**

Due Date	Record Count
January 2010	4
March 2010	3
April 2010	20
May 2010	12
June 2010	1
July 2010	3
October 2010	7
December 2010	2

**% Budget Consumption**

Sum of Total Commitment (Thousands)

Program: Parent Program	Percentage
Arts & Culture	1%
Community	67%
Education	27%
Other	5%

Multiple graphical parts



# Budget Allocation Report

**Multi-level  
hierarchical  
programs  
with  
budgets  
and  
balance  
amounts**

Budget Allocation Report - salesforce.com - Enterprise Edition

https://na9.salesforce.com/000E0000000HANE

Budget Allocation Report - salesforce.com - Enterprise Edition

Grantee Reports Due - salesforce.com - Enterprise Edition

foundationconnect

Home Programs Objectives Budgets Dockets Reports Dashboards

### Budget Allocation Report

Report Generation Status: Complete

Report Options:

Summarize information by: Program: Parent Program Fiscal Year Show: All budgets

Time Frame: Date Field: Fiscal Period End Date Range: Custom

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

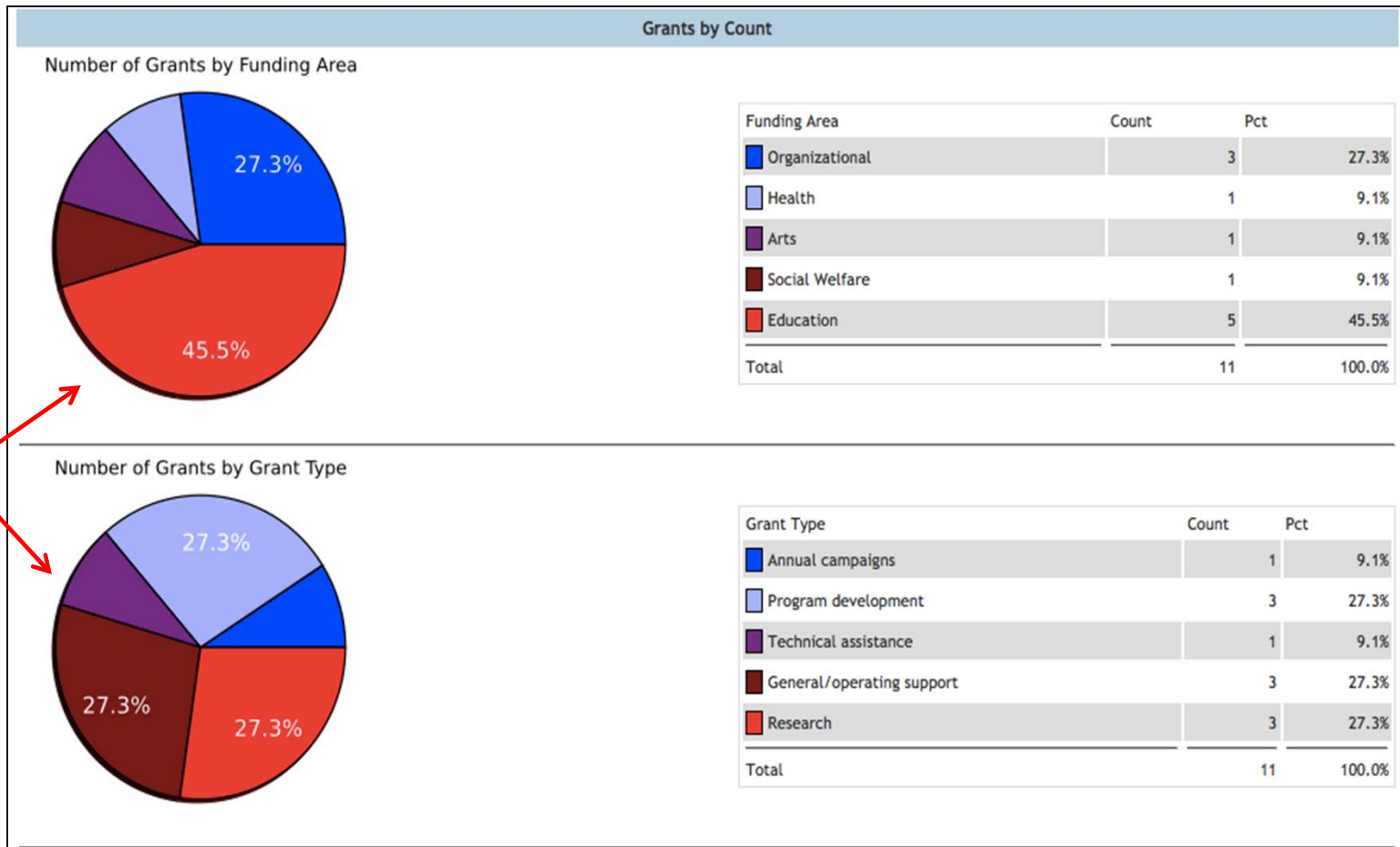
Filtered By: Edit Program: Parent Program not equal to Clear

Program: Parent Program	Program: Program		Fiscal Year					Grand Total	
			2010	2011	2012	2013	2014	2015	
Arts & Culture	General Operations	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$6,000.00	\$7,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,000.00
		Sum of Balance	\$494,000.00	\$493,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,987,000.00
	Media & Communication	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$0.00	\$6,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,000.00
		Sum of Balance	\$500,000.00	\$494,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,994,000.00
	Subtotal	Sum of Total Budget	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$6,000,000.00
		Sum of Total Commitment	\$6,000.00	\$13,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$19,000.00
		Sum of Balance	\$994,000.00	\$987,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$5,981,000.00
Community	Critical Assistance	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$0.00	\$251,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$251,000.00
		Sum of Balance	\$500,000.00	\$249,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,749,000.00
	Policy Issues	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$0.00	\$6,250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$6,250.00
		Sum of Balance	\$500,000.00	\$493,750.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,993,750.00
	Subtotal	Sum of Total Budget	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$6,000,000.00
		Sum of Total Commitment	\$0.00	\$257,250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$257,250.00
		Sum of Balance	\$1,000,000.00	\$742,750.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$5,742,750.00
Education	Early Education	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$0.00	\$5,250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,250.00
		Sum of Balance	\$500,000.00	\$494,750.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,994,750.00
	K-12	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$0.00	\$100,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$100,000.00
		Sum of Balance	\$500,000.00	\$400,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,900,000.00
	Subtotal	Sum of Total Budget	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$6,000,000.00
		Sum of Total Commitment	\$0.00	\$105,250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$105,250.00
		Sum of Balance	\$1,000,000.00	\$894,750.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$5,894,750.00
Health	Capacity Building	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,000.00
		Sum of Balance	\$499,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,999,000.00
	Research	Sum of Total Budget	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$3,000,000.00
		Sum of Total Commitment	\$2,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,000.00
		Sum of Balance	\$498,000.00	\$499,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$500,000.00	\$2,997,000.00
	Subtotal	Sum of Total Budget	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$6,000,000.00
		Sum of Total Commitment	\$3,000.00	\$1,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,000.00
		Sum of Balance	\$997,000.00	\$999,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$1,000,000.00	\$5,996,000.00
	Grand Total	Sum of Total Budget	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$24,000,000.00
		Sum of Total Commitment	\$9,000.00	\$376,500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$385,500.00
		Sum of Balance	\$3,991,000.00	\$3,623,500.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$4,000,000.00	\$23,614,500.00

Check rows to filter, then drill down by: --None-- Drill Down

Chat

# Grants by Count



**Multiple graphical parts**

# Grant Summary Information

The screenshot displays the PhilanTrack DEMO interface for the XYZ Foundation. The top navigation bar includes links for Home, Grantees, Grants, Proposals, Grant Reports, Internal Reports, Analyze, and Templates. A user greeting for 'Tim Smythe' is visible in the top right.

On the left side, there is a calendar for January 2013. Below the calendar are sections for Alerts (e.g., '01/17/2013 Arts After School submitted Proposal') and a To Do List (e.g., 'Follow up with ABC grantee').

The main content area is titled 'Summary' and features a table of grant records. The table includes columns for Grantee, Grant, Stage, Status, and Recent Activity (What and Date). The records are filtered by Stage: All, Status: All, and Date: All received. There are 26 records in total.

Grantee	Grant	Stage	Status	Recent Activity	Date
ACADEMY OF VOCAL ARTS	Continuing support (2009-456)	Grant	Report received 02/05/2010	Interim Grant Report rec'd	02/05/2010
ACADEMY OF VOCAL ARTS	Vocal Arts Experience	Proposal	Received	Proposal rec'd	10/12/2012
ACADEMY OF VOCAL ARTS	2011 Curriculum Development	Proposal	Grant awarded	Proposal rec'd	09/16/2010
ACADEMY OF VOCAL ARTS	Academy of Vocal Arts Ongoing Support	Proposal	Grant awarded	Proposal rec'd	08/10/2011
ACCESSABILITY PROJECT INC	Accessibility Project Continuing Support	Proposal	Grant awarded	Proposal rec'd	08/04/2008
ACCESSABILITY PROJECT INC	Accessibility Project	Proposal	Declined	Proposal rec'd	04/28/2008
Arts After School	General_Support_2006 (2006-87)	Grant	Final report received	Final Grant Report rec'd	02/27/2007
Arts After School	Extracurricular Arts (R-4437)	Grant	Report received 11/18/2009	Annual Grant Report rec'd	11/18/2009
Arts After School	Outreach (2007-2)	Grant	Final report received	Interim Grant Report rec'd	04/10/2007
Arts After School	Curriculum Development (2011-568)	Grant	Final report received	Interim Grant Report rec'd	06/28/2012

**A calendar and a table with drill down capability**

# Application Status, Indicators and Summary Data



The SmartSimple Foundation

Applications ▾ Communications ▾ Organization ▾ Home David Resnick ▾ Help ▾

## Grants Manager

Applications Application Activities Payments

New Application  Search Advanced Search

All	LOI - Submitted	Draft	Submitted	Under Review	Approved	Total
After School	0	1	0	0	4	5
Community	0	0	0	0	2	2
<b>Total</b>	0	1	0	0	6	7

Overview Indicators My Indicators Reports Maps

**Requested**  
\$236,000.00

**Project Expenses**  
\$354,700.00

**% Foundation**  
67%

**Project Capital**  
\$21,600.00

**Average Request**  
\$33,714.29

**Average Salary**  
\$26,857.14

**Project Revenues**  
\$459,000.00

**Average Expenses**  
\$50,671.43

KPI Settings

**Key Performance Indicator (KPI) Information**



# Submission Status, Pending Review, Regional Counts, GIFTS by Type

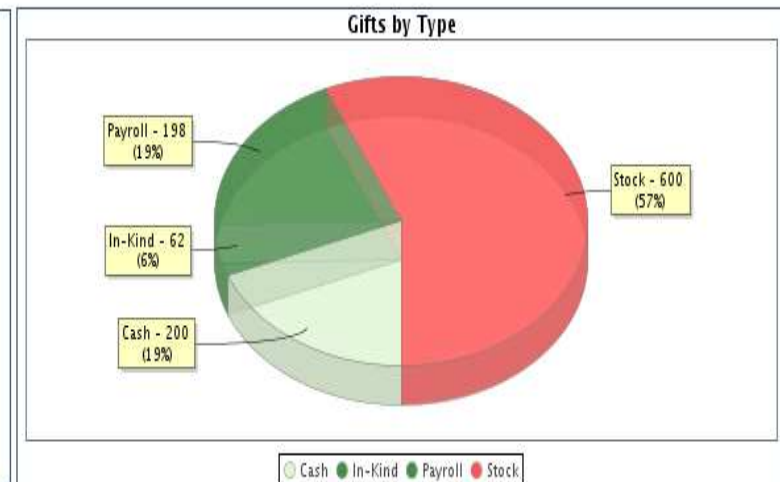
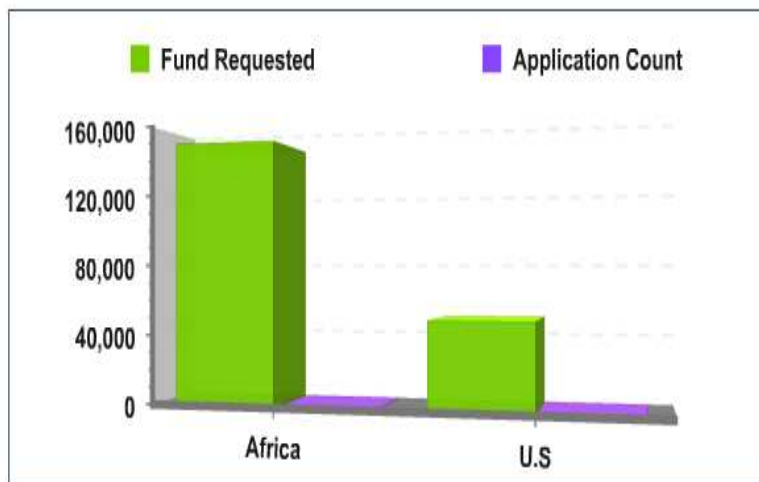
**Staff: Submissions by Statuses**

Status Name	Count
Approved	6
Completed	1
Declined	1
Draft	1
Under Review	2

**Pending Review** **Drill-down capability**

Program	Type	Status	Drafted Date
Cool the Planet	<a href="#">Review</a>	Submitted	2012-07-03 11:28:00
Water for Everyone	<a href="#">Review</a>	Submitted	2012-06-29 12:39:00
Water for Everyone	<a href="#">Review</a>	Submitted	2012-08-03 14:07:00
What to do after school?	<a href="#">Review</a>	Submitted	2012-12-07 11:23:00
What to do after school?	<a href="#">Review</a>	Submitted	2012-12-18 16:41:00

**Staff submission by status summary**



# Grant Application Table with Review Ratings



**Drill-down capability**

Welcome, R. Grant Manager [Not R. Grant Manager?](#)    [HELP](#) [LOGOUT](#) [AA](#) ▼

Charity Trust  
2014 Winter Grant Program    **\$2,500,000.00 Available**  
12/31/2014 Deadline

My Account   Applications   Custom Report   Compare Applications   Scoring Report   Invoices   Payments   Reporting   Export Data   Program Setup

**Applications**

Submitted Applications   Pre-Applications   Incomplete Applications   Include:  Approved    Undecided    Declined/Not Qualified   Official Decisions ▼

<input type="checkbox"/>	Submitted Applications	\$ Requested		Votes (For-Against)	Trial Decisions (Committee)	Official Decisions (Committee)
<input type="checkbox"/>	Help the Homeless <a href="#">Big Proposal</a>	\$100,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	5 - 1	\$20,000.00	\$25,000.00
<input type="checkbox"/>	Help the Homeless <a href="#">Big Proposal #2</a>	\$2,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	4 - 0	\$4,500.00	\$2,000.00
<input type="checkbox"/>	Meager Nonprofit Agency <a href="#">Red Ribbon Proposal</a>	\$225,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	1 - 5	Undecided	\$180,000.00
<input type="checkbox"/>	Microscopic Nonprofit Agency <a href="#">Poverty Prevention Day</a>	\$20,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	1 - 4	Approve	\$20,000.00
<input type="checkbox"/>	Mini Nonprofit Agency <a href="#">Life Management Skills Seminars</a>	\$20,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	3 - 1	Undecided	\$20,000.00
<input type="checkbox"/>	Non-Profit Agency of Colorado <a href="#">Big Proposal</a>	\$66,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	0 - 0	Approve	Approved
<input type="checkbox"/>	Petite Nonprofit Agency <a href="#">First Proposal</a>	\$45,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	2 - 3	Undecided	Approved
<input type="checkbox"/>	Pint-Sized Nonprofit Agency <a href="#">Spring Proposal</a>	\$100,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	3 - 3	Undecided	\$80,000.00
<input type="checkbox"/>	Small Nonprofit Agency <a href="#">Financial Self Sufficiency Seminar</a>	\$125,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	0 - 4	Undecided	Undecided
<input type="checkbox"/>	Teeny Nonprofit Agency <a href="#">Homelessness Prevention/Awareness Initiative</a>	\$5,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	5 - 0	Undecided	Approved
<input type="checkbox"/>	Tiny Nonprofit Agency <a href="#">Money Management for Dummies</a>	\$20,000.00	<a href="#">Print</a>   <a href="#">PDF</a>	1 - 0	Undecided	Undecided
11 Submitted Applications		\$728,000.00			\$24,500.00	\$327,000.00
					\$2,475,500.00	\$2,173,000.00
					\$2,500,000.00	\$2,500,000.00

Download All Attachments  
This will download a ZIP file with all attached documents.

Send Email To Selected  
Mass Update Selected (same answer for each selected)

[Copy to Official!](#)

**(Administrator View)**

# Post-Funding Report Status

Welcome, R. Grant Manager [Not R. Grant Manager?](#) [HELP](#) [LOGOUT](#) [▲▲▼](#)

Charity Trust  
2014 Winter Grant Program \$2,500,000.00 Available  
12/31/2014 Deadline

My Account Applications Custom Report Compare Applications Scoring Report Invoices Payments Reporting Export Data Program Setup

### Post-Funding Reporting

<input type="checkbox"/>	Officially Approved Applications	Award Amount	Report 1 12/31/2050	Report 2 12/31/2051	Report 3 12/31/2052	Report 4 12/31/2053
<input type="checkbox"/>	Help the Homeless <a href="#">Bio Proposal</a>	\$25,000.00	4/14/2011	4/14/2011	1/9/2013	1/15/2013
<input type="checkbox"/>	Help the Homeless <a href="#">Bio Proposal #2</a>	\$2,000.00	4/14/2011	4/14/2011	4/14/2011	4/14/2011
<input type="checkbox"/>	Meager Nonprofit Agency <a href="#">Red Ribbon Proposal</a>	\$180,000.00	7/6/2011	Due: 12/31/2051	12/31/2001	Due: 12/31/2053
<input type="checkbox"/>	Microscopic Nonprofit Agency <a href="#">Poverty Prevention Day</a>	\$20,000.00	7/5/2011	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
<input type="checkbox"/>	Mini Nonprofit Agency <a href="#">Life Management Skills Seminars</a>	\$20,000.00	Due: 12/31/2050	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
<input type="checkbox"/>	Non-Profit Agency of Colorado <a href="#">Bio Proposal</a>	\$0.00	Due: 12/31/2050	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
<input type="checkbox"/>	Petite Nonprofit Agency <a href="#">First Proposal</a>	\$0.00	Due: 12/31/2050	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
<input type="checkbox"/>	Pint-Sized Nonprofit Agency <a href="#">Spring Proposal</a>	\$80,000.00	7/5/2011	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
<input type="checkbox"/>	Teeny Nonprofit Agency <a href="#">Homelessness Prevention/Awareness Initiative</a>	\$0.00	Due: 12/31/2050	Due: 12/31/2051	Due: 12/31/2052	Due: 12/31/2053
9 Total		Total \$327,000.00				

(Administrator View)

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Late and requires action





# An Online Service that's a Digital Dashboard for eGrant Reporters

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# What is a mashup?

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A mashup is an application that combines content from more than one source into an integrated experience.



Enter a city, address, etc.

Zoom To

Tell us what you think »



**ABOUT THIS MAP**

Change Map Parameters

**Map Type**

Grants

Recipients: 274  
Grants: 589

Data View

**Basic Parameters**

Map View: U.S.  
Geographic Display: State  
Subjects: All



## PHILANTHROPY IN/SIGHT®: SKILLMAN

### Grant Details

<b>Recipient Name</b>	<u>Hanstein Elementary School</u>
<b>Recipient Location</b>	Detroit, Michigan, United States
<b>Type of Recipient</b>	Education, early childhood education; Elementary school/education
<b>Grant Amount</b>	\$50,000
<b>Year</b>	2007
<b>Duration</b>	3-year grant
<b>Description</b>	For Good Schools: Making the Grade.
<b>Type(s) of Support</b>	Program development
<b>Subject(s)</b>	Children; Education, early childhood education; Elementary school/education; Government, local; Infants/toddlers
<b>Grantmaker Name</b>	<u>The Skillman Foundation</u>
<b>Grantmaker Location</b>	Detroit, Michigan, United States
<b>Type of Grantmaker</b>	Independent foundation



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The screenshot displays the 'CHANGE MAP PARAMETERS' interface. On the left, a vertical sidebar contains a 'CHANGE MAP PARAMETERS' button and a map view. The main content area is divided into 'QUICK START' and 'ADVANCED OPTIONS' sections. The 'QUICK START' section includes 'Plot Map Pins' (with a checked 'Recipients' checkbox), 'Grant Indicator' (set to 'None'), 'Subjects' (with 'All' checked and a list of categories like 'Arts and Culture', 'Education', 'Health'), 'Geographic Focus' (set to 'U.S. Map'), and 'State' (set to 'None'). The 'ADVANCED OPTIONS' section features a 'Demographic Indicator' dropdown menu with a red arrow pointing to it, and a list of indicators including 'None', 'American Human Development Indices', 'U.N. Human Development Indices', 'Population', 'Education', and 'Health'. Below this are 'Skillman Filters', 'Grant Filters', and 'Keyword Filter' sections. On the right, a map shows a location with a red pin. Further right, a sidebar titled 'ABOUT THIS MAP' shows 'Map Type: Grants', 'Recipients: 274', 'Grants: 589', and 'Basic Parameters' (Map View: U.S., Geographic Display: State, Subjects: All). A 'Data View' button is also present.

**150+ demographic "mashup" database overlays to see with your grant information**



Technology Affinity Group  
Promoting technology in philanthropy

idealware

## DATA AT A FOUNDATION'S FINGERTIPS: CREATING AND BUILDING DASHBOARDS



Source: <https://tagtech.site-ym.com/?publicreports>



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# Time for Q&A!

Go to [www.iaa.com](http://www.iaa.com) for more information about integrated foundation information systems and digital dashboards