2016 Consumers Guide to Grants Management Systems
Vendor Product Update Supplement

November 2016

First Edition

TABLE OF CONTENTS

INTRODUCTION

In May 2016, we released the fourth edition of *A Consumers Guide to Grants Management Systems*, a collaborative effort of Idealware, Grants Managers Network, and the Technology Affinity Group. (Download it for free at http://idealware.org/ reports/ consumers-guide-grants-management-systems-2016.)

Each edition of the report allows us to publish a wider range of information about the grants management systems available to foundations, which is a push toward greater transparency in the marketplace. We believe this report has an effect on the market, as well. By making it easier for foundations to compare the different available systems not just against their own needs, but against one another, as well, we believe the *Consumers Guide* encourages vendors to make their software more competitive.

People choose systems based on more than just the features they offer—they also consider the strength of the vendors that produce them and the development trajectory for the software. Just as a grantmaker's needs evolve and change, vendors also continue to develop their products. This year, for the first time we're publishing this *Vendor Product Update Supplement* to the *Consumers Guide*. We invited vendors included in the report to submit information about any updates or additions they have made to their systems since our software demos for the report. We'll work with them to update this supplement three more times, in six-month intervals, as a way to keep you up-to-date on product changes between editions of the *Consumers Guide*. If you signed up to download the report, we'll email you each time the supplement is updated.

By publishing both the guide and the supplements, we strive to provide transparency that fosters healthy competition in the market and helps vendors to be more responsive to their clients' needs. Participation in this update is not mandatory, and not all vendors chose to participate in this inaugural edition. That does not mean they won't choose otherwise in subsequent editions, nor does it mean their systems are not being updated. We'll continue to invite them in the future.

CYBERGRANTS

Company Name: CyberGrants, LLC
Product Name: CyberGrants
Website: www.cybergrants.com
Approximate number of foundation clients: 300 grantmaking clients overall, 100 of which are foundations

To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?

Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	
Online Applications	X			
Form Design & Flexibility	X			
Application Review				X
Relationship Management	X			
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting	X			

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		We have upgraded our duplicated organization detection tools. The new tools are smarter, faster, and safer than before.
Online Applications		
Form Design & Flexibility		
Application Review		We have introduced a new "snapshotting" capability that will allow users to automatically capture versions of the grant and then compare the results in a side-by-side display.
Relationship Management		
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting		

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

FLUXX

Company Name: Fluxx
Product Name: Grantmaker
Website: fluxx.io
Approximate number of foundation clients: 200

To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?

Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			x	x
Online Applications			x	
Form Design & Flexibility			x	x
Application Review			x	x
Relationship Management			x	x
Grant Requirements & Outcomes Evaluation			x	x
System Querying and Reporting			x	x

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	New functionality & upgrade to existing functionality.	**Fluxx for iOS:** Native Fluxx App with the ability to add dashboards, add cards, filter, and see real-time updates. **Fluxx for Android:** On the way! **CPI Adjusted Values:** The Consumer Price Index (CPI) feature calculates the current value of all previous grants utilizing any annual CPI index (such as a region or demographic specific index). **Bulk Payment Scheduler (grants) + Bulk Repayment Scheduler (PRIs):** Schedule a batch of payments by different date intervals and save the effort of scheduling several or many payments individually. **Signals and @mentions:** Two-way communications between internal and external users within Fluxx. @ mentions allow you to specifically call out one or more people in your note in order to share information with them and communicate back and forth. **Overview/Summary dashboards:** High level summary view and visualizations of data.
Online Applications	Upgrade to existing functionality.	**Branded portal:** The portal allows the foundation to clearly display their logo for consistent branding throughout the grantee experience. The modernized user interface makes it easier for external users to navigate through their requests. **Guidestar Exchange v3 integration:** allows access to Guidestar's catalog of nonprofit organizations from the Fluxx application. Organization and people records can then be created by using this component and information can be directly added to the grant request or LOI forms.
Form Design & Flexibility	New functionality & upgrade to existing functionality.	**Field Validation and Masking:** Field Validation provides real-time feedback for end-users typing data into fields. The character types and limits will be enforced by default validations that match the expected format of data by field type in the Fluxx database.
Application Review	New functionality & upgrade to existing functionality.	**Navigation Warnings:** Browser warnings alert the user when navigating away from a record that is open in Edit mode. **Reviewer Selector:** The Reviewers Selector component allows you to assign individual or groups of reviewers that can either be pre-configured or done on an ad hoc basis.
Relationship Management	New functionality & upgrade to existing functionality.	**Connected Data:** Improvements have been made to Connected Data Tabs that allow all associated records in the listing to be opened in a new Card and reveals record counts to indicate the number of items contained in each, before opening the Connected Data Tab.

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Grant Requirements & Outcomes Evaluation	New functionality & upgrade to existing functionality.	**Grant Request Report Scheduler:** This will schedule the request report to generate in the record, on the specified date.
System Querying and Reporting	New functionality & upgrade to existing functionality.	**Relative Date Filters:** Allows users to define a range of dates to query. For example, query all Requests submitted in the "Last three quarters" or payments made in the "Last two weeks". **Excel Add-in:** An integration with Microsoft Excel allows users to create formatted excel reports right within Fluxx using select Fluxx fields. Multi-tabbed templates and additional data aggregation can be created, leveraging the rich formatting and data analysis tools of Excel. **Enhanced pivot tables:** With the Adhoc Report builder, you can now create pivot tables with multiple row, column, and data fields.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to viefuture planned development and updates to the system? Yes

If so, please provide a URL where the product roadmap can be viewed: Discussions about our product roadmap along with monthly release notes are accessible to our clients via our Community site.

FOUNDANT TECHNOLOGIES

Company Name: Foundant Technologies
Product Name: Grant Lifecycle Manager
Website: www.foundant.com
Approximate number of foundation clients: 1034

To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?

Summary of Changes

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Internal Tracking			X	X
Online Applications				X
Form Design & Flexibility			X	
Application Review			X	X
Relationship Management				X
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting			X	X

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	1 - New Functionality 2 – Upgrade to existing functionality	1 - Administrators can now choose which fields applicants have access to view and/or update. Administrators also have an audit log of everything changed on an organization's profile. 2 – Updated the payment tool with a new user interface
Online Applications	1 – New Functionality 2 – New Functionality	1 – Guidestar for Grant Applicants: This feature allows applicants to copy their Guidestar Profile information directly into their applications. 2 – Regular Expression (RegEx) type questions have been added to all forms in Advanced. This allows the Administrator to require answers in certain formats, amounts, orders…etc. and customize the message if the question is answered wrong.
Form Design & Flexibility	1 - Upgrade to Existing Functionality	1 – Updated the Rich Text Editor to include more features.
Application Review	1 - Upgrade to Existing Functionality 2 – New Functionality	1 – Workload pages now have Tabs to easily access the other stages. 2 – Reviewers will now see the average scores for all the reviews completed, in each stage, if the Administrator allows them to.
Relationship Management	New functionality	Applicants can now view an email audit history to see what emails have been sent to them by the Administrator and Foundant system.
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting	1 – Upgrade to existing functionality 2 – Upgrade to existing functionality	1 – The Search page has an upgraded process, date and status filter. 2 – Batch Options has been added to the Search page for easy batch processing.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

GIVINGDATA

Company Name: GivingData
Product Name: GivingData
Website: http://givingdata.com/
Approximate number of foundation clients: 13

To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?

Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	
Online Applications				X
Form Design & Flexibility				X
Application Review				X
Relationship Management			X	
Grant Requirements & Outcomes Evaluation				X
System Querying and Reporting	X			

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	Upgrade to existing Functionality	New functionality in associating grant payment statuses with the status of the grant, improving budget projection capabilities. Additional payment tracking design improvements for managing payment schedules and payment contingencies. Also, self-serve capabilities introduced for the creation of document templates in Microsoft Word.
Online Applications	New Functionality	Version 1 release of Grantee Portal and online Grant Application product. Foundation staff can invite grantee users to submit grant applications/proposals through the Grantee Portal. Applications can be multi-page with one or more questions per page. Data is saved instantaneously allowing applicants to securely save data and return at a later time to complete the application. Multiple applicants from the same grantee organization can work on the same application. Supports file uploads to supplement information submitted through forms.
Form Design & Flexibility	New Functionality	Application forms are highly flexible and can be designed as multi-page forms to improve ease of use for applicants. At this time, the design of application forms requires assistance from the GivingData team.
Application Review	New Functionality	Foundation staff can review all materials submitted through the Grant Application once the applicant has submitted the application (application marked as "Submitted"). Foundation can then request changes to the application as needed. Submitted application can be printed or exported as a PDF document for offline review. Application Review workflows can be set up to manage a more formal review process. Workflows allow for formalized and ad hoc review processes including task dependencies.
Relationship Management	New Functionality	Introduced a robust grantee relationship timeline view providing a picture of the relationship with a grantee over time. Initial data points include grant approvals/declinations, payments, and requirements/reports. Currently in development are the ability to capture and track additional data points such as key events at the grantee (ex. leadership changes), tax status verification dates, and other grant related activities (site visits, phone calls, etc.).

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Grant Requirements & Outcomes Evaluation	New functionality	Released a grant Monitoring & Assessment dashboard providing aggregate views of grant assessments of evaluation, grant activity, outcome and indicator data. Assessment data can be viewed across the entire foundation, by program, geography, or program officer portfolio. Provides views of both quantitative and qualitative data. Allows drill down to assessments (rankings and narratives) for individual grants.
System Querying and Reporting	Upgrade to existing functionality; new functionality	Added new searchable fields (e.g., ability to search notes on requests and organizations). Improved export to excel capabilities. Added Batch Processing capability to System Querying results..
Financial Analysis Tools	New functionality	Ability to track grantee fiscal year budgets:, financial health indicators (surplus/deficit, month coverage) based on revenue, expenses, and unrestricted net assets; estimate of percentage of organizational budget funded in the current fiscal year.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

SMARTSIMPLE SOFTWARE INC.

Company Name: SmartSimple Software Inc.
Product Name: GMS 360°
Website: www.smartsimple.com
Approximate number of foundation clients: 200

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Summary of Changes

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Internal Tracking		X	X	
Online Applications	X			
Form Design & Flexibility		X	X	X
Application Review	X			
Relationship Management	X			
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting		X	X	X

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		**Payment Scheduler - new functionality** The Payment Scheduler enables the generation of payments in batches, simplifying the scheduling process when multiple payouts are required. Grantors can schedule awards to grantees based on a set of specified requirements such as dates, the receipt of progress reports, etc. The Payment Scheduler also offers a mapping option for specified fields (start date, end date, total award amount, payment amount, payment number). Based on the provided criteria, an initial schedule is generated and the scheduler pre-populates the payment fields. Once saved, the actual record is created. The scheduler can also load existing payments already scheduled, add new, and delete existing ones. **Reorganized Status Bar - upgrade to existing functionality** We've enhanced the look and feel of the status indicator. The status indicator lets a user know the exact status of any activity they're working on. For example, the status indicator will let a potential grantee know how much of an application they have completed. We've shortened status names to save space for improved readability. If a tool tip is offered with the status, the associated text is displayed when the user moves their mouse over the status bar. **Improved Field History - upgrade to existing functionality** We've enhanced the status history of your activities with the addition of a visual chart. You can see each activity clearly and compare the amount of time spent in each status (open, draft, escalated, closed, etc.). This chart has been added directly into the status history list.
Online Applications		
Form Design & Flexibility	New Functionality	**New Field Types - upgrade to existing functionality** A series of new field types have been added. For example, the new in-line data grid feature will give users the ability to build a data sheet on the page they're currently working on, without having it open up a pop-up lightbox. This is ideal for simple budget creation or data that needs to be presented in a grid format. There is also a separate save button for the page so you don't have to go in and out of a document to save your information. Other field types include additional formatting options for phone numbers, and new options for uploading and annotating media files. **Improved UI/UX - upgrade to existing functionality** We've updated the overall user interface for a better look and feel as well as increased overall screen real estate. Lookup functionality has also been updated to the current light box view that's standard in our user interface. The styling has also been refreshed for a more contemporary look that makes it easier for users to find features and navigate the system from their own portals. Lookup pages for users and organizations have also been updated in line with standardized styles. The design is also completely responsive, offering a cleaner and easier-to-read view on mobile devices and tablet computers by adjusting text and visuals to the size of your screen.
Application Review		
Relationship Management		

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting		**Business Intelligence (BI) Dashboard - new functionality** This feature is ideal for board members and granting staff who want descriptive graphics that clearly display their information on their personal portal. BI Dashboards offer regularly updated overviews of granting data, ensuring users always see the most up-to-date statuses. Five charts and one mapping option are available; users select which fields are represented by which graph type and set the data filters for what they want to see. The BI Dashboard will always remember the last settings used and provide options to zoom in for greater detail. Use the mapping option with current addresses to drill down into the details of specific grants based on location for more granular analysis of where your funding is working. **New Tables in Report Builder - upgrade to existing functionality** Enhanced Neo Report Builder provides simplified report building for all users. We've expanded the number of data sets and fields available based on your reporting requirements. You can now include data for user and company event activities, notes, and status name for an increased range of options. **New Charting Feature - new functionality** For our Arcadia interface users, we've added the option to build detailed charts directly from your current list view without needing to use the Report Builder feature. List View Charts aggregates your data into one of seven available chart styles. This feature is highly intuitive and easy to use, maintaining the current columns and filtering the information you want to share directly from your list view. No requirement to re-input any details. This feature also offers the ability to see the data as tables or charts, and an option to drill down into the data for a more granular view. Users then have the option to download the chart or table as a PNG, JPEG, PDF or vector image.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

SUBMITTABLE

Company Name: Submittable
Product Name: Submittable
Website: www.submittable.com
Approximate number of foundation clients: 50+

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Summary of Changes

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Internal Tracking				
Online Applications				
Form Design & Flexibility				
Application Review			Multi-round review	
Relationship Management				
Grant Requirements & Outcomes Evaluation				
System Querying and Reporting				

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		
Online Applications		
Form Design & Flexibility		
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting		

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

VERSAIC

Company Name: Versaic
Product Name: Versaic Grants
Website: www.versaic.com
Approximate number of foundation clients: 30 (majority of clients are corporate)

To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?

Summary of Changes

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Internal Tracking		X	X	X
Online Applications				X
Form Design & Flexibility		X	X	
Application Review				X
Relationship Management				X
Grant Requirements & Outcomes Evaluation		X	X	X
System Querying and Reporting		X	X	

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		1. Full support for managing Program Cycles by client admin users (including start/end dates, specific forms and data capture, configurable workflow/task stages for review/decision making, etc.). 2. Capability that enables the system, based on some action and specific criteria (e.g. once Approved but only if Focus Area = Workforce Development and Grant is Over $25,000), the ability to trigger additional actions (e.g. sending of a custom email, requesting additional information from the applicant, assigning a Task or initiating a workflow, or any combination therefore: upon approval the system can generate a custom grant agreement in PDF, attach it to an email which is sent to the applicant with a link back to the system where they are required to upload the signed agreement and answer any other questions, with the system sending proper email reminders for a period of time until complete and escalation protocols to admin users after a certain period of time if not complete). 3. Approval action enhancement, enabling for custom UI to streamline the approval process (e.g. the ability to specific logic for the system to automatically generate Payments from selected Budgets with specific attributes selected, significantly reducing the number of steps and button clicks for this approval stage).
Online Applications		1. New configurable Grantee/Grantor in-system discussion feature (custom forms can be created and activated for an individual grant that allows the grantee and grantor to add comments, upload documents, or answer any other questions as many times as needed. Often used for discussion during application/review, or post approval for the grantee to share stories and photos, etc.).
Form Design & Flexibility	New Functionality	1. Ability to display answers to questions within forms (e.g. displaying application answers to applicants during progress reporting, or displaying progress results to admin users during performance assessments). 2. Capacity to create linked Forms to parent forms (e.g. associated with a completed Application, the ability to send an email to any number of individuals and ask that they complete a survey which will be tied back to the application, showing the Admin user all submissions of the survey within the grant application record).
Application Review		1. External reviewer capability (enabling admin users to recruit reviewers to participate in the review process for a specific program cycle, supporting multiple stages of review such as a COI/Expertise stage followed by Full Review once admin users have assigned specific Reviewers to designated applications)
Relationship Management		1. Option to integrate with CRM or HR systems with custom options to connect individuals to Organizations based on client specific requirements.

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Grant Requirements & Outcomes Evaluation		1. Data capture fields in progress and final reports now can be displayed conditionally based on selections by admin users (e.g. if approved for Program and Capacity Building support with funding allocated between the two, grantees will be asked to report on both areas against the specific funding amounts in a single progress/final report) 2. Data capture fields in progress and final reports can now be displayed conditionally based on selections by the grantee from the initial application (e.g. the grantee will select one or more strategic focus areas and/or select specific participants or results they expect to make if approved, and during progress or final reporting the system will display these expectations and ask for progress/final results, but only for those areas of tracking relevant based on initial application entries). 3. Data captured within the application, progress reports, internally by admin users, etc. can now be displayed to applicants (or staff) during the editing/submission of any forms (e.g. the ability to display previous answers during progress reporting: "You said you would do this _____, what is your progress to date?") 4. Any/all data captured can be populated into ad-hoc custom generated Excel reports with graphs/charts and now these can be created as custom worksheets to be provided to applicants (e.g. after approval, the applicant can access a custom Excel worksheet to use to track progress metrics offline before coming back to complete progress/final reports).
System Querying and Reporting		1. Full support for budget creation, duplication and mass payment editing. 2. Enhancements to system query options to provide users will full access to all data points across all programs they have rights to manage, with the ability to generate ad-hoc Excel reports associated with programs, mailboxes and other criteria to meet various configuration requirements of individual clients.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? Yes

If so, please provide a URL where the product roadmap can be viewed: N/A

WIZEHIVE

Company Name: WizeHive

Product Name: Zengine

Website: www.wizehive.com/grant-management-system

Approximate number of foundation clients: We now have approximately 300 customers using Zengine with our foundation breakdown being 30 percent private, 14 percent family, 6 percent community, 15 percent corporate, 30 percent public and 2 percent government.

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Internal Tracking		X	X	
Online Applications		X		X
Form Design & Flexibility		X	X	
Application Review		X	X	
Relationship Management		X	X	
Grant Requirements & Outcomes Evaluation		X		X
System Querying and Reporting		X	X	

Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	Upgrade to existing functionality	We enhanced the system to scale from thousands to hundreds of thousands of applications, review and related data. We also added pagination to our datagrids to improve navigation for large groups of records.
Online Applications	New functionality	Our applicant portal available in May provided a way for applicants to enter and manage their applications. We released a new advanced submission portal that allows for significantly more two way communication within a single portal interface. In addition to allowing applicants to fill out more complex application forms, it allows them a better way to view previously submitted reports, enter, edit or view additional follow-up forms, and manage a more robust post-award data collection processes.
Form Design & Flexibility	Upgrade to existing functionality	We improved numeric field types to include international currencies. We also now allow an administrator to set a minimum or maximum number that someone can enter into a number field.
Application Review	Upgrade to existing functionality	We improved the review portal to allow administrators to hide, re-order, and re-name certain application fields for reviewers.
Relationship Management	Upgrade to existing functionality	We improved our automatic email feature to include mail merge fields.
Grant Requirements & Outcomes Evaluation	New functionality	Our new submission portal makes it easier to collect follow-up data for outcomes evaluation that links back to the original application.
System Querying and Reporting		We made three significant upgrades: • Enhanced dashboard to provide more flexibility for displaying number formatting • improved number field sorting and filtering options. • redesigned our filter screen to make it easier to use.

Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system? No

If so, please provide a URL where the product roadmap can be viewed: N/A

ABOUT THE REPORT PARTNERS

About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit www.idealware.org to learn more or view our hundreds of free articles, resources, and reports.

About Grants Managers Network

Grants Managers Network's mission is to improve grantmaking by advancing the knowledge, skills, and abilities of grants management professionals and by leading grantmakers to adopt and incorporate effective practices that benefit the philanthropic community. Grants Managers Network is a leader in identifying and promoting effective grantmaking practices through field-wide change efforts. Learn more at www.gmnetwork.org.

About the Technology Affinity Group

The Technology Affinity Group (TAG) is a nonprofit membership organization that promotes the power of technology to advance the goals of the philanthropic sector. TAG is an active community of professionals responsible for aligning technology with the philanthropic objectives of their organizations, striving to provide the highest quality resources and learning opportunities for TAG members in an open environment built on trust and a shared belief in the greater common good.