What's New in Grants Management Software and Services

GMN
Grants Managers Network

October 21, 2010

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President
Information Age Associates
47 Murray Place
Princeton, NJ 08540 USA
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www.iaa.com
609-924-6936

InformationAgeAssociates

Major Trends in 2009 - 2010

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

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

Major Vendor-Provided Information

- Table containing key vendor provided information
- 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)
Altum *(1998)* *877-GO-ALTUM* *703-657-8299* *www.altum.com* *info@altum.com* *12100 Sunset Hills Rd* *Suite 101* *Reston, VA 20190*	16 Easy-grants clients 43 proposal-CENTRAL clients 24 Federal clients using PC, EG and other Altum grant related solutions 3 non-US clients (1 PC, 2 EG)	35 staff	Medium-to-large foundations Federal & State government agencies biomedical grant-making organizations	• Easygrants® – Program Planning & Management – Application – Review (internal and/or external; individual & committee/panel) – Grantee Financial and Progress Reporting – Grants Management – Contact Management – Workflow Configuration – Integrated Document Management (SharePoint) – Queries & Reports • proposalCENTRAL® – Application – Review – Progress Reports – Grants Management – Contact Management – Queries & Reports • Altum Query Module ® • Altum Financial Management and Costing Applications (based on Infor Performance Management)	• Easygrants – Program management – Outcomes logic framework – Workflow & task builder – PDF builder – Screen label manager – SharePoint integration (document management) – High throughput performance enhancements – Security management – 508 accessibility compliance • proposalCENTRAL – New module: outcome/ impact tracking & program logic framework – Extensive modifications to support online com… meet… down… disc… – Enh… man… prog… stan… to ac… – Data… file f… Four… HRA… (gra… shar… – Exp… data… awar… – Abili… that… the … proc…	• Microsoft Word • Microsoft Excel • Microsoft Outlook • Microsoft SharePoint • Report Writers and Business Intelligence Software (e.g., Crystal, Cognos) • Custom links to accounting systems • Custom links to compliance verification service(s) • Custom links to CRM systems, internal authentication	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 …

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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)
Bromelkamp Company LLC *(1979)* *888- 290-9087* *www.bromelkamp.com* *info@bromelkamp.com* *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	• First Pearl (grants, CRM) • Corporate Pearl (grants, CRM, matching gifts, dollars for doers, event tracking) • Community Pearl (grants, CRM, fund accounting, fundraising) • eGrant.net (online grants application management tool) – online applications and reporting – scholarship applications – online review – Application Status • Pearl Companions – Pearl Geocoder – Pearl NCOA (National Change of Address database) – Pearl ACH (direct deposit of grants and/or donor pledges) – Pearl Outlook Updater – Scan to Chronicle – Pearl Web Collector/Reporter – Bridge to QuickBooks or Peachtree accounting • Pearl Loan Servicing (for PRI's) • Pearl (custom)	• eGrant.net – advanced calculations – improved validation checks • Pearl – Enhanced document management – Enhanced unattended email correspondence – Automatic document storage – Enhanced GuideStar integration with automatic Charity Check recordkeeping – Grants/gifts payable automation – Integrated document scanning – Streamlined fund accounting interface – More powerful and flexible joint investment allocation, spendable allotment and fund fees assessment – Workflow processing agent	• Microsoft Word • Microsoft Excel • Microsoft Outlook • GuideStar • MapQuest • Google • ChoicePoint Bridger Insight for compliance verification • QuickBooks • Citrix MetaFrame • FIMS import from eGrant.net • Peachtree	Licensed software Optional hosted via Windows Terminal Server or Citrix Server Fundweb.net (donor statements and grant recommend-ations 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

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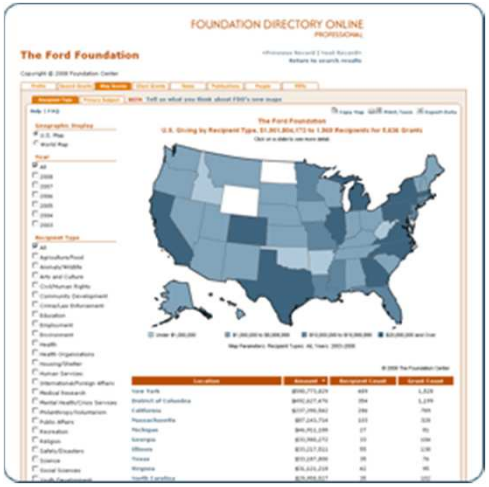
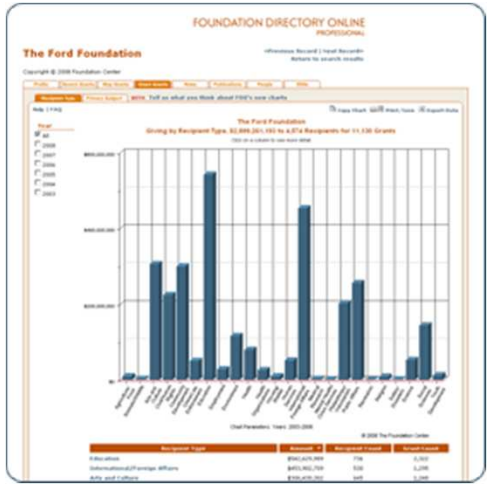
FOUNDATION DIRECTORY ONLINE

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





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eGrant Reporting Standard Established in 1998

eGrant Reporting

eGrant Reporting Standard

The following record format/standard describes various types of information that can be included in an electronic grants list. You only need to include those you have available in your own grants management system. Contact Kati Neiheisel at kmn@foundationcenter.org or call (212) 807-3675 if you have any questions about creating and sending an electronic grants file.

Items 1-14 are more basic grant information. Items 15-25 contain information that will help us describe your grants from the perspective of your own programs. Finally, items 26 and 27 will let us better represent total support awarded by community foundations.

1	Grantee organization name	Organization's name as officially recognized (by the IRS for U.S. organizations)
2	Unique grant number	Unique grant number used by the foundation to identify the grant (to be used for reconciliation purpose only)
3	Grantee unit	Subdivision or department of grantee to which grant is awarded
4	Grantee street address	Primary street address
5	Grantee city	City location of grantee
6	Grantee state	Two letter abbreviation for grantee state or province
7	Grantee zip or foreign mailing code	5- or 9-digit zip code or foreign alpha-numeric mailing code
8	Grantee country	To be used *only* 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

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

Altum

Bromelkamp Company foundation technology

Common Grant Application
Simplifying the Art & Science of Giving®

FLUXX

CyberGrants

FOUNDANT technologies

FUSION LABS

The JK Group Inc. THE JK GROUP, INC.
Integrated Solutions for Global Philanthropy

MICRO EDGE

philanTECH

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FOUNDATION DIRECTORY ONLINE
PROFESSIONAL

Carnegie Corporation of New York

«Previous Record | Next Record»
Return to search results

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

Recipient Type | Primary Subject

Help | FAQ

Copy Map | Print/Save | Export Data

Geographic Display
- (•) U.S. Map
- ( ) World Map

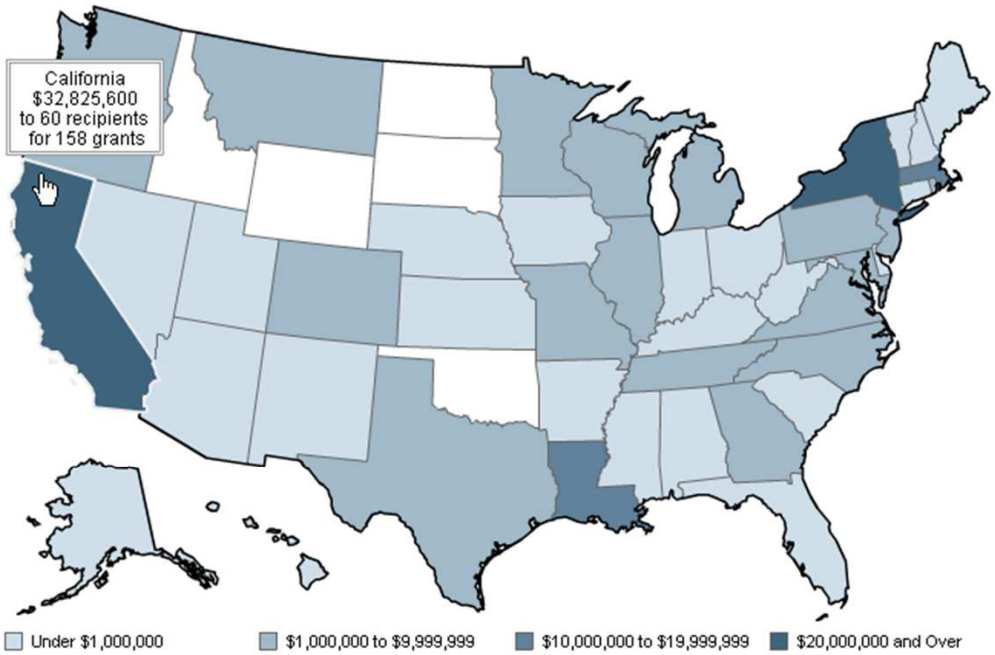
Year
- [x] All
- [ ] 2008
- [ ] 2007
- [ ] 2006
- [ ] 2005
- [ ] 2004
- [ ] 2003

Recipient Type
- [x] 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

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.



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

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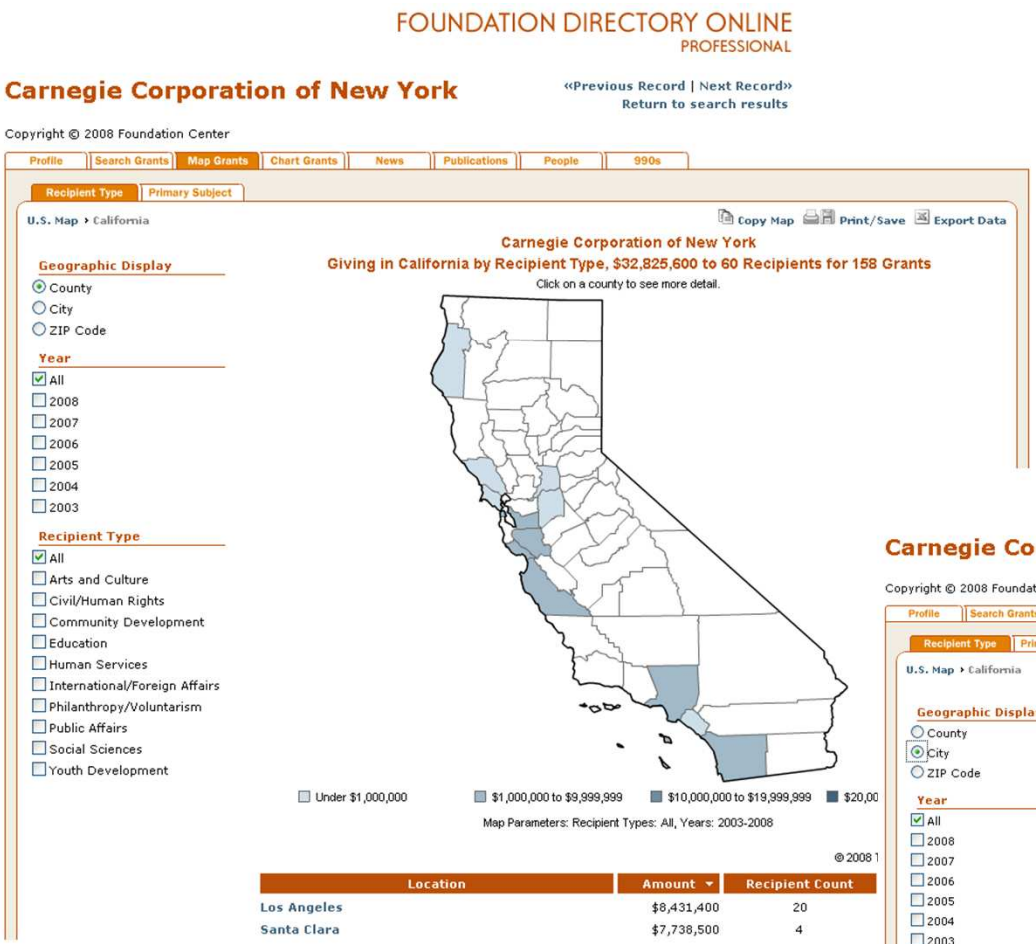
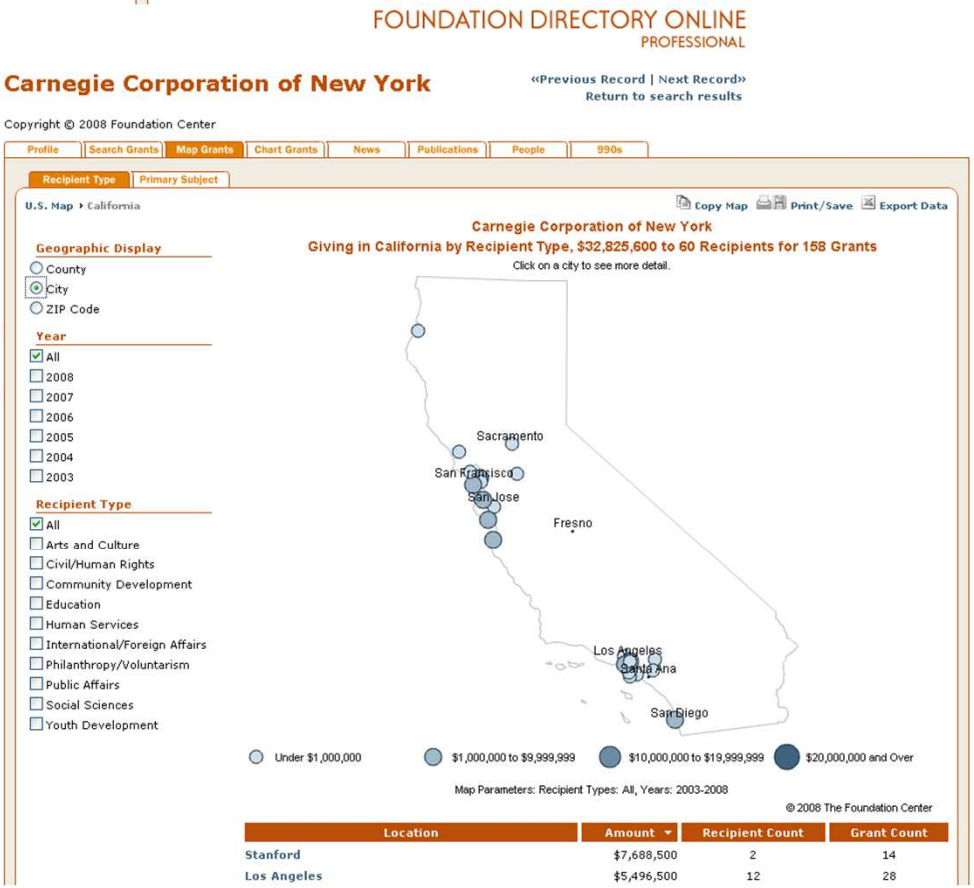
Location	Amount	Recipient Count	Grant Count
District of Columbia	$159,002,500	180	469
New York	$93,677,600	542	855
California	$32,825,600	60	158



← County display

City display →



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

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

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Home About FAQs User Manual Log Out

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

Total Assets: No Minimum to No Maximum

Total Giving: No Minimum to No Maximum

Establishment Year: No Minimum to No Maximum

Grantmaker Type:

☑ All

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

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.*

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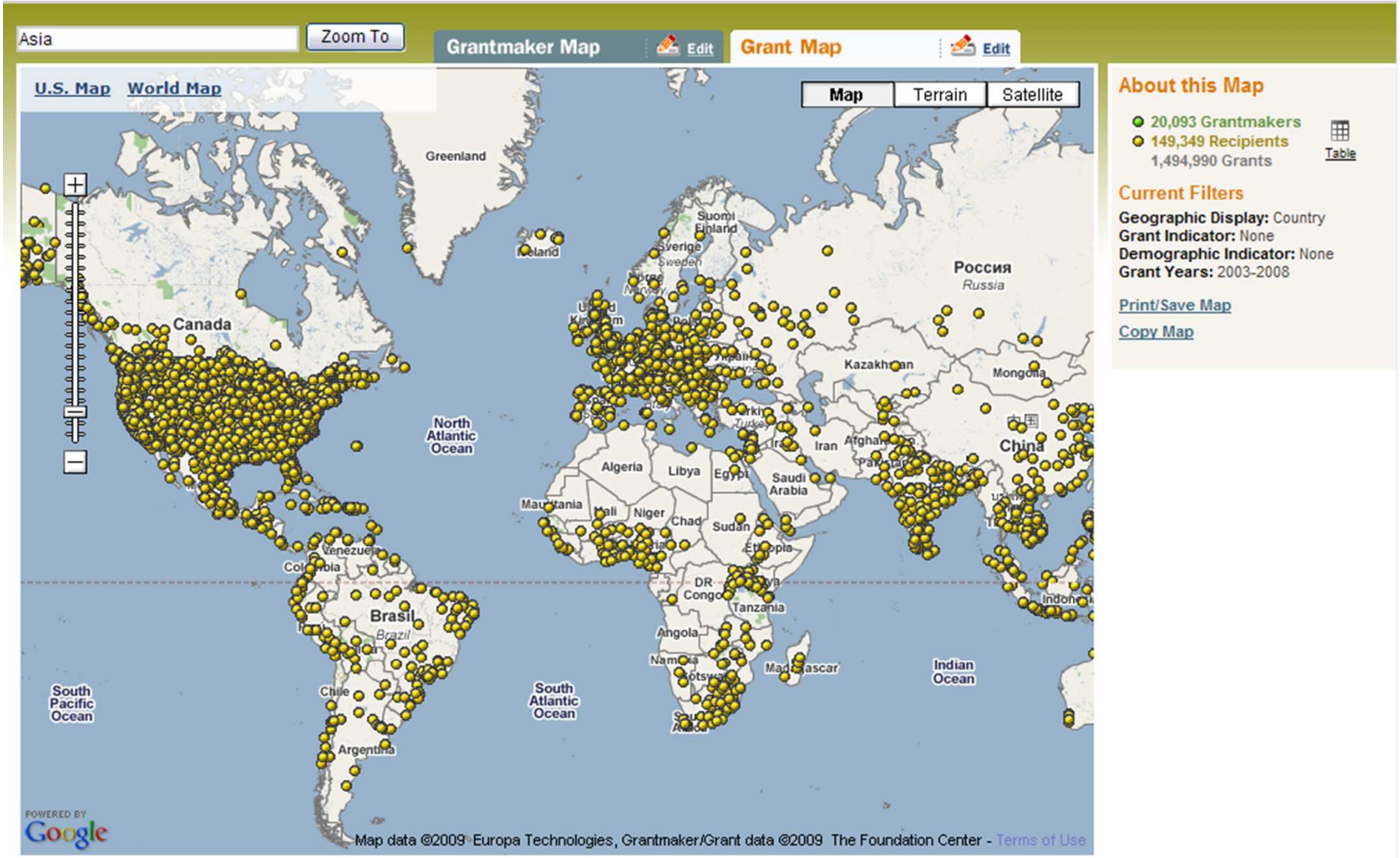

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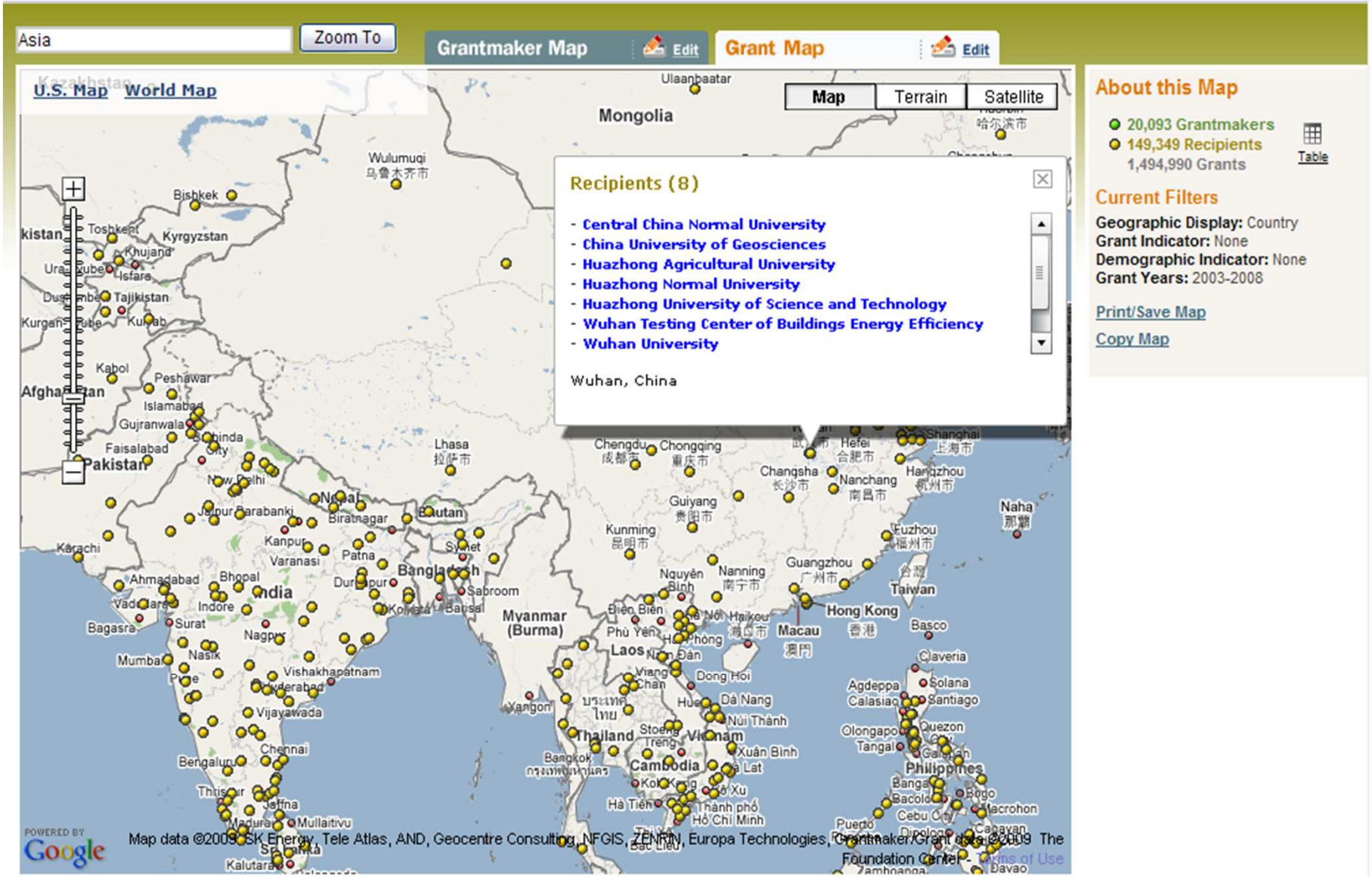
Home About FAQ Help Log Out



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Energy Foundation

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

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

Type of Grantmaker
Independent foundation

Established
1991

EIN
943126848

990-PF
2007, 2006, 2006, 2005, 2004, 2003, 2002, 2001

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

Fields of Interest
Subjects: Environment, energy. **International Interests:** China.

Recipient List(370)

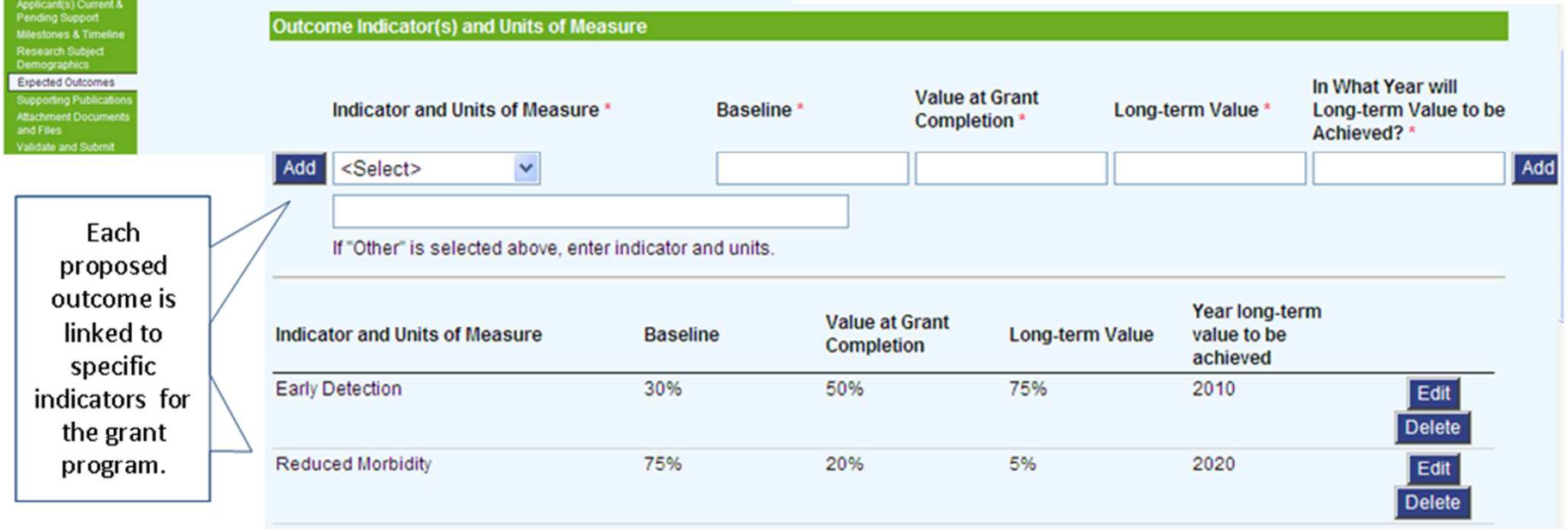
Name ▲	City	State	Grant Count
20/20 Vision Education Fund	Silver Spring	MD	1
Alliance for Affordable Energy	New Orleans	LA	3
Alliance for Clean Energy New York	Albany	NY	1
Alliance for Sustainability	Minneapolis	MN	1
Alliance to Save Energy	Washington	DC	16
American Coalition for Ethanol	Sioux Falls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

Done
Internet
100%

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.



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).

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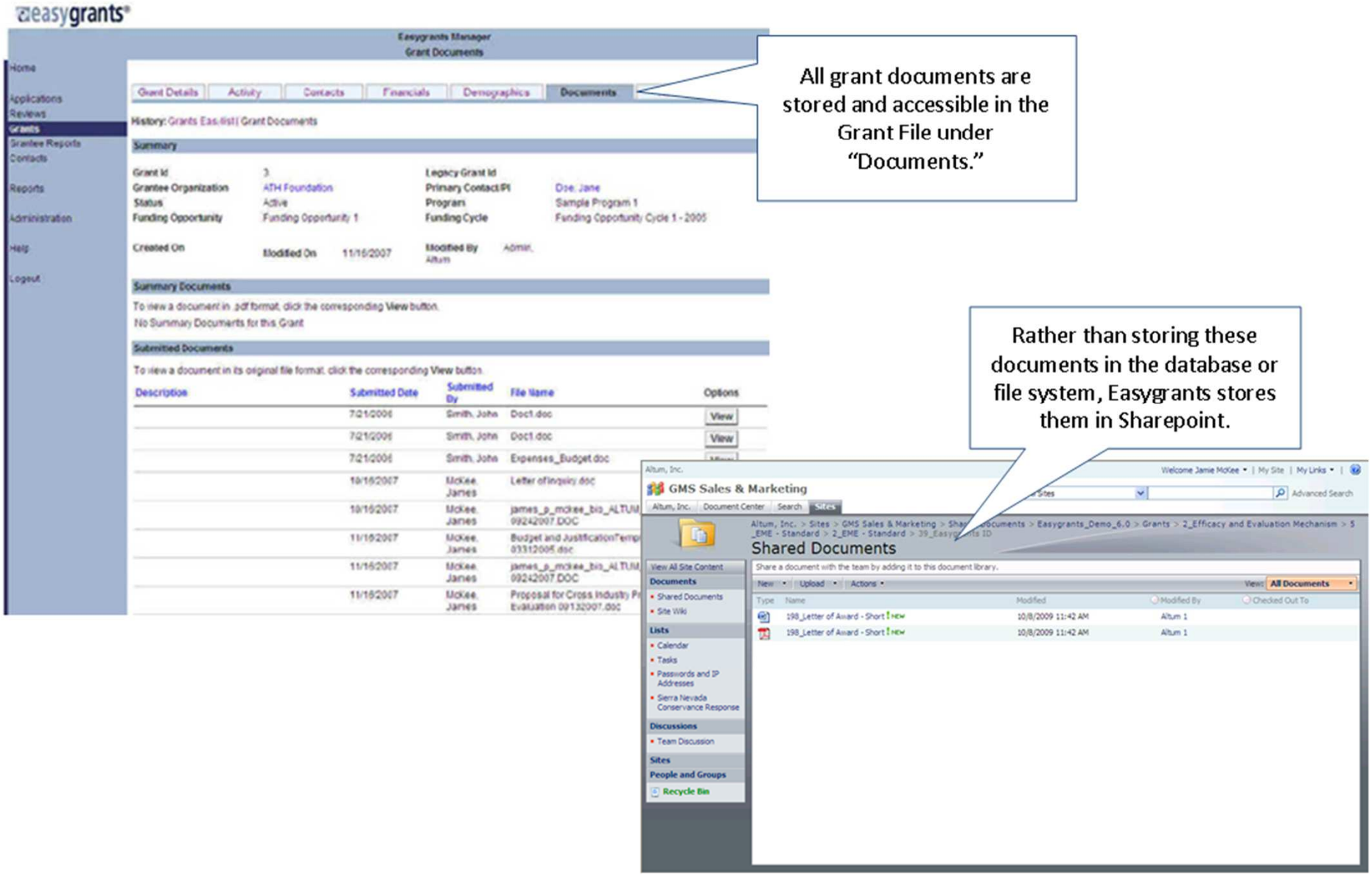
Easygrants is integrated with MS Sharepoint for document management. Documents are collected through workflow tasks or added directly to the grant file.



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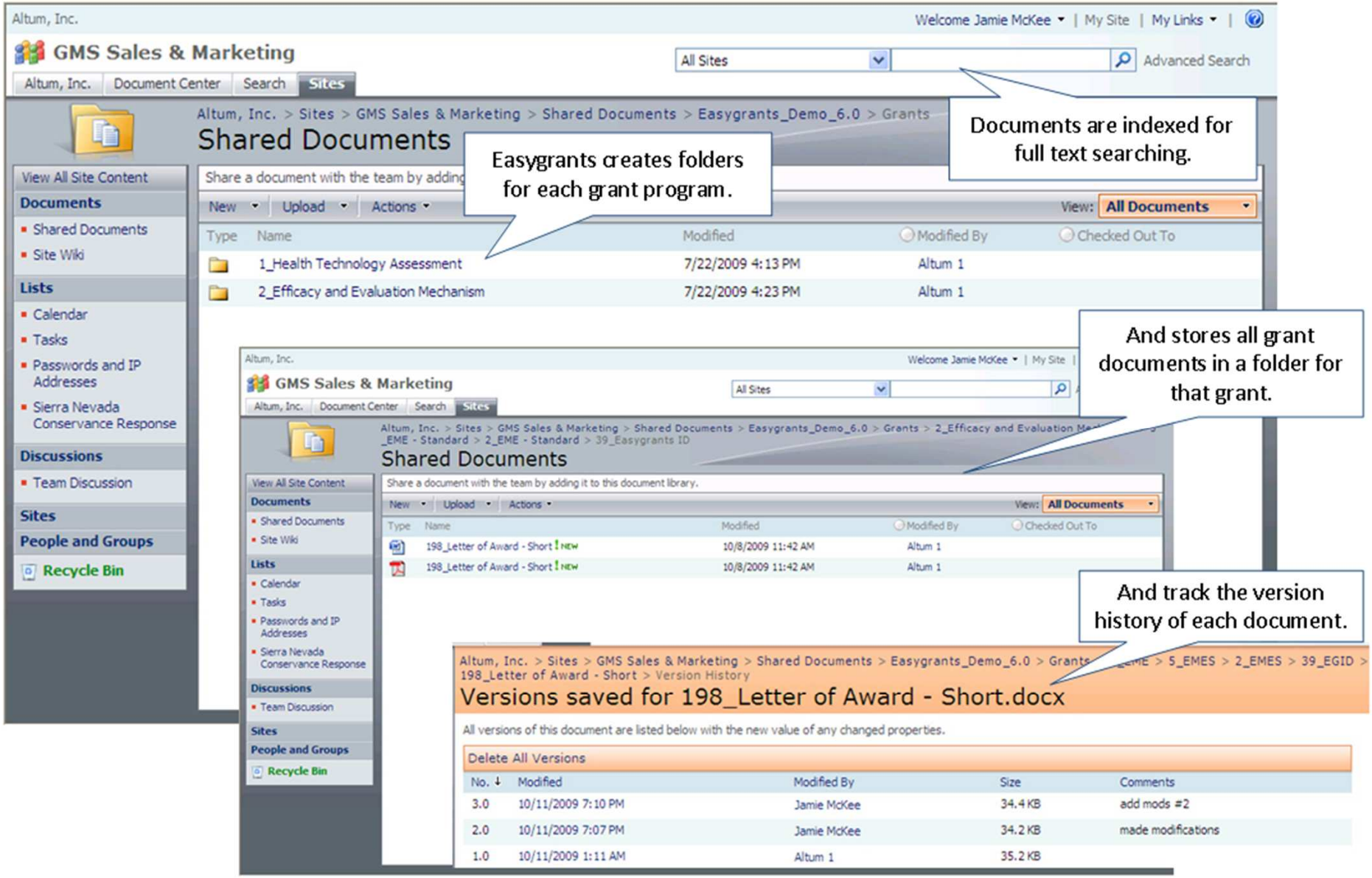
As a document management system, Sharepoint provides version tracking and full text searching of grant documents.



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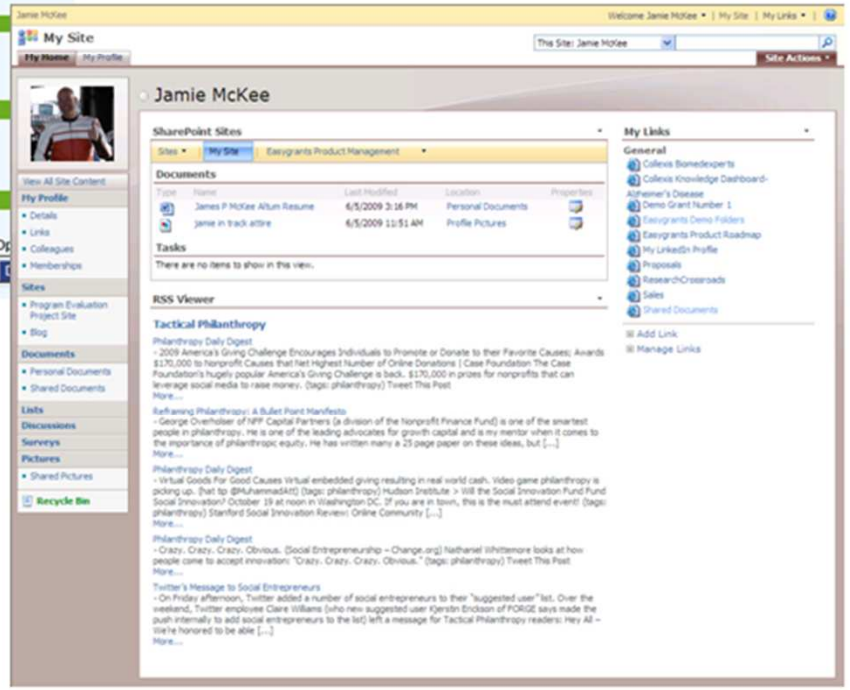
Documents can be created and edited through process controls (Easygrants' tasks) or through the collaboration facilities of Sharepoint.

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

…or shared and edited collaboratively in Sharepoints project sites.



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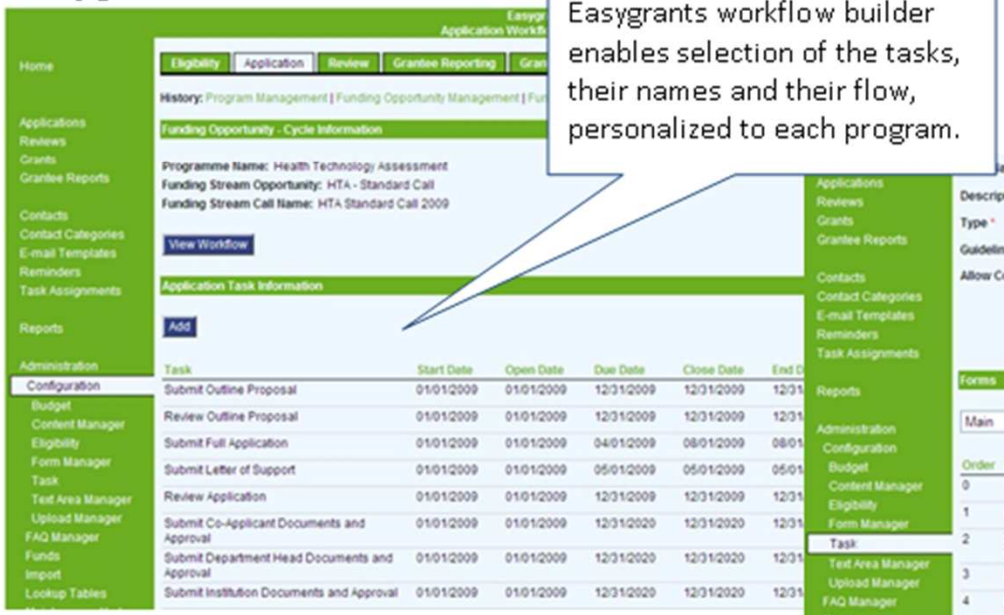
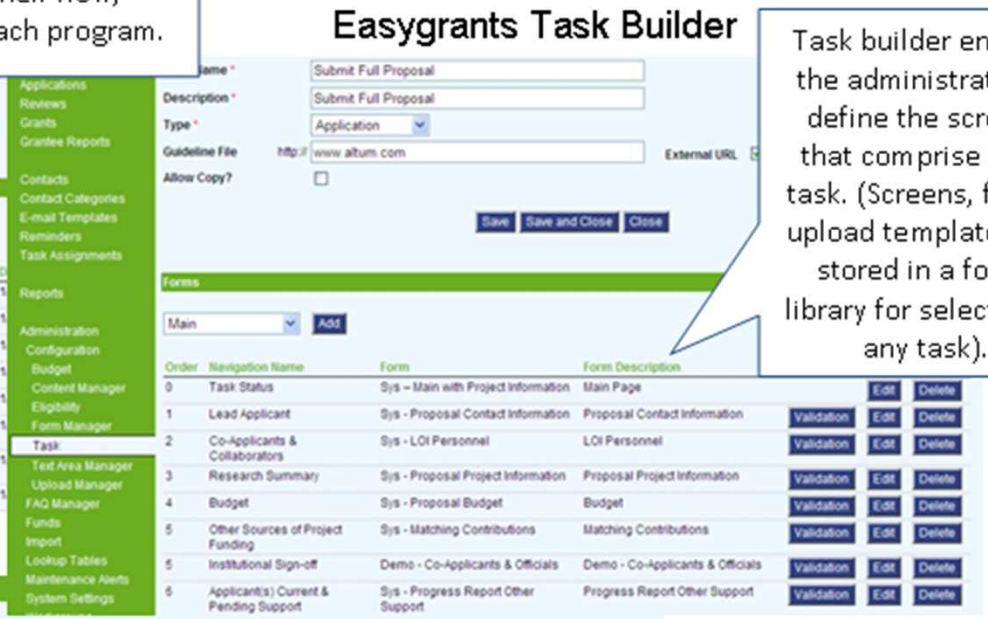
Every organization has its own work processes and terminology – Easygrants provides for personalization of the grants management system beyond logos and style sheets.

Easygrants Workflow Builder



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

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).

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.

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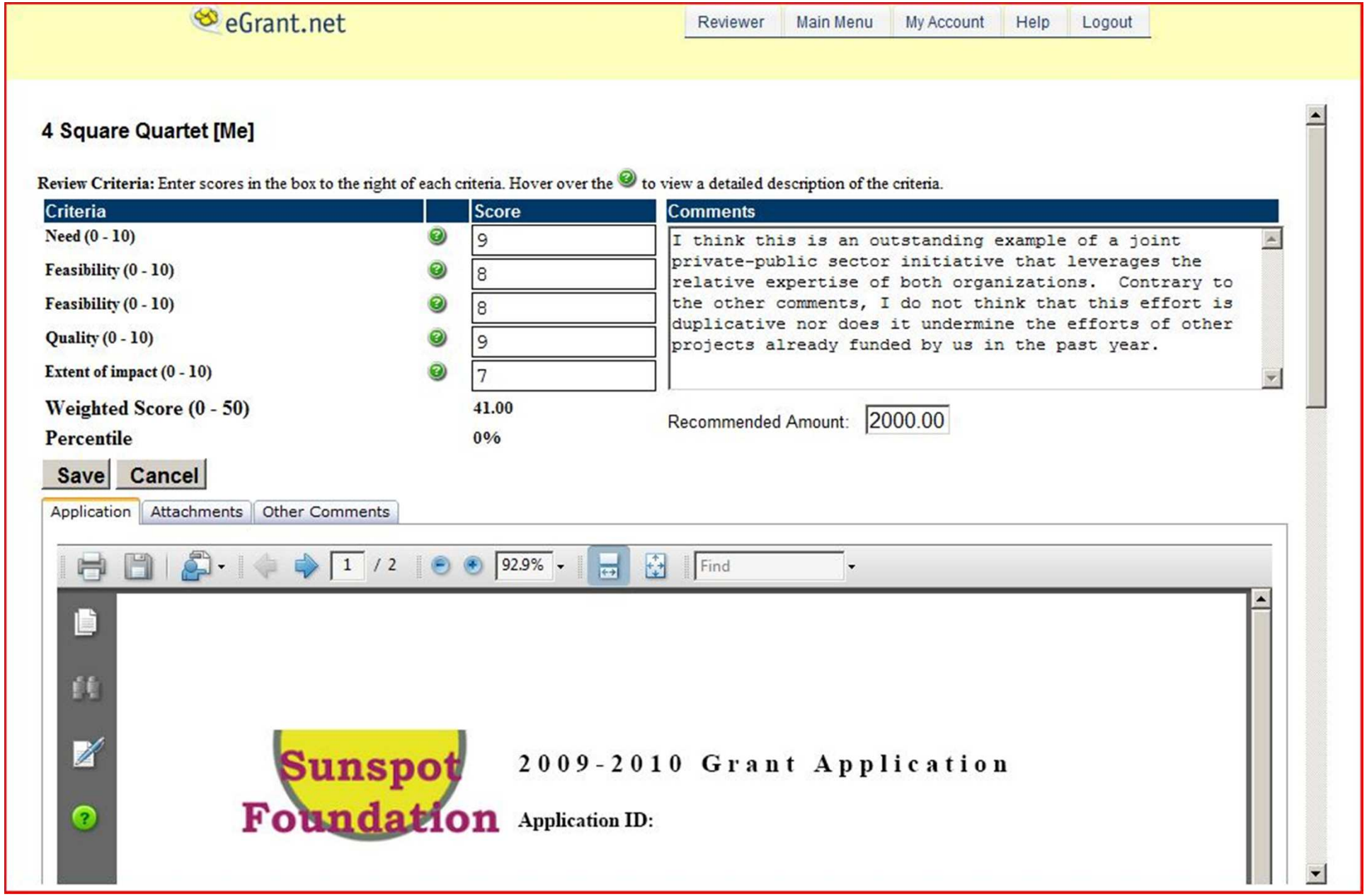
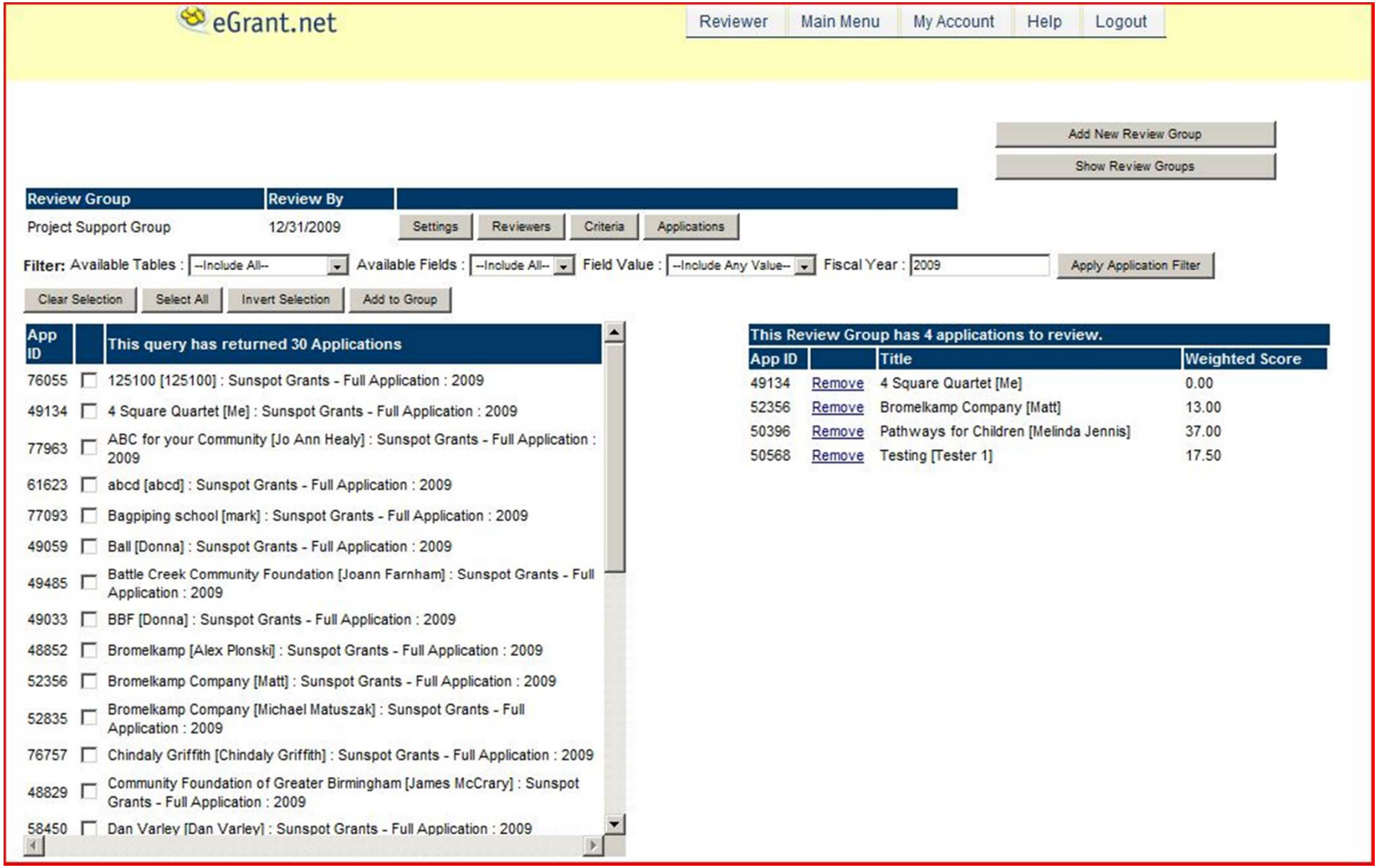
First Pearl
Corporate Pearl
Community Pearl
eGrant.net
Pearl Companions
Pearl Loan Servicing
Pearl Custom



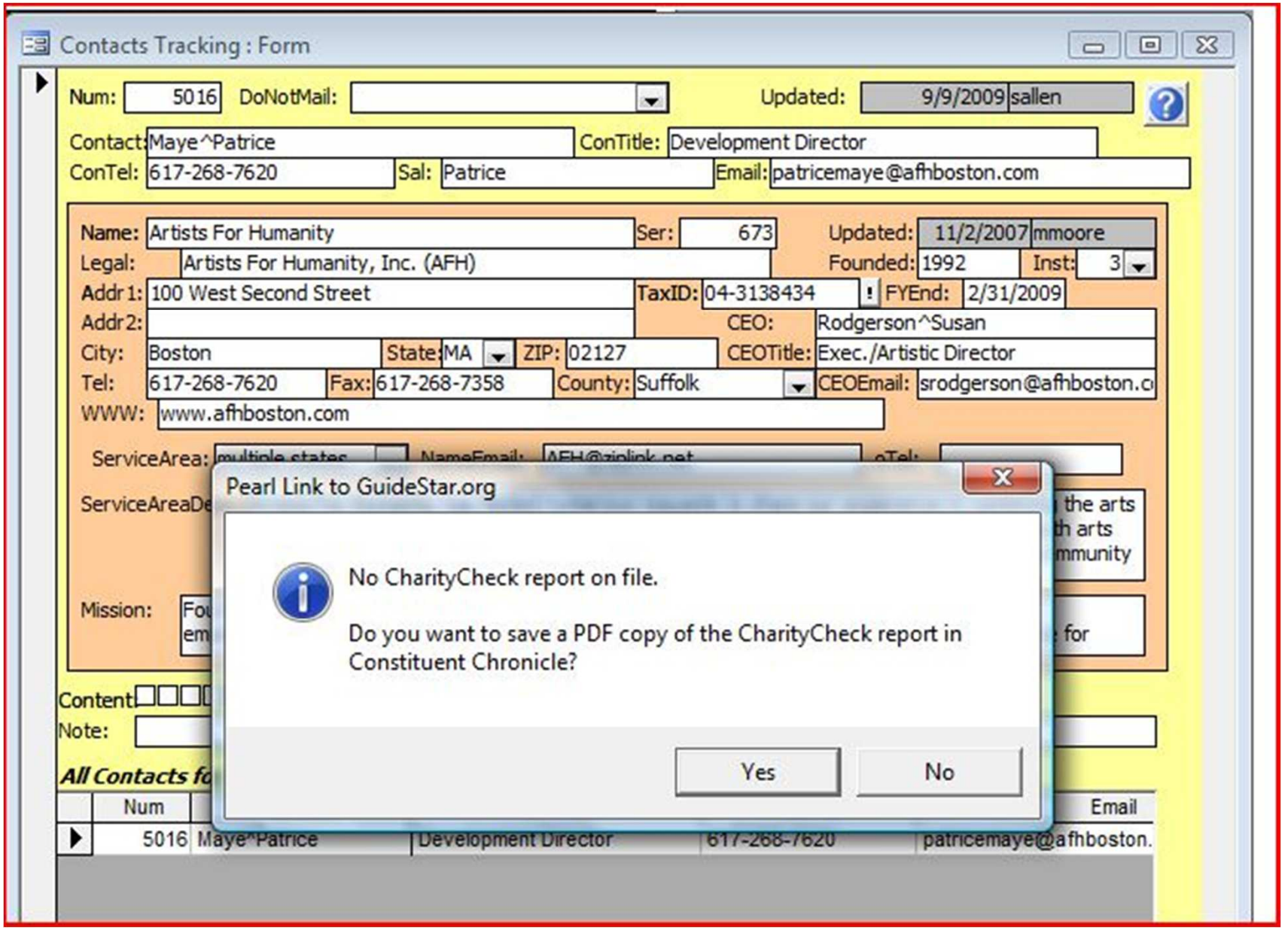
Review Cover



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



Pearl Link to GuideStar Charity Check

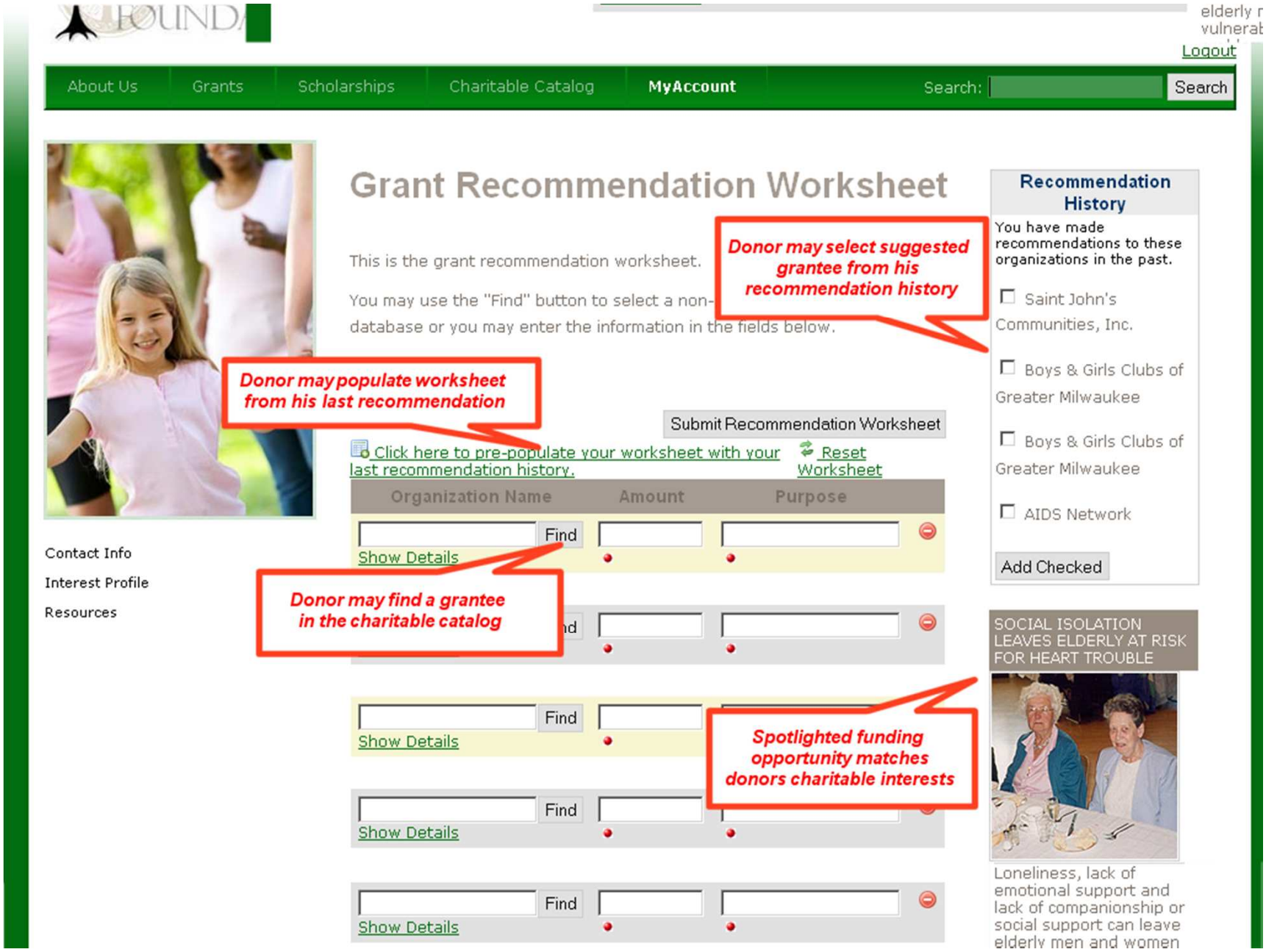
Bromelkamp Future Developments for 4Q 2009 and 2010

- 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.

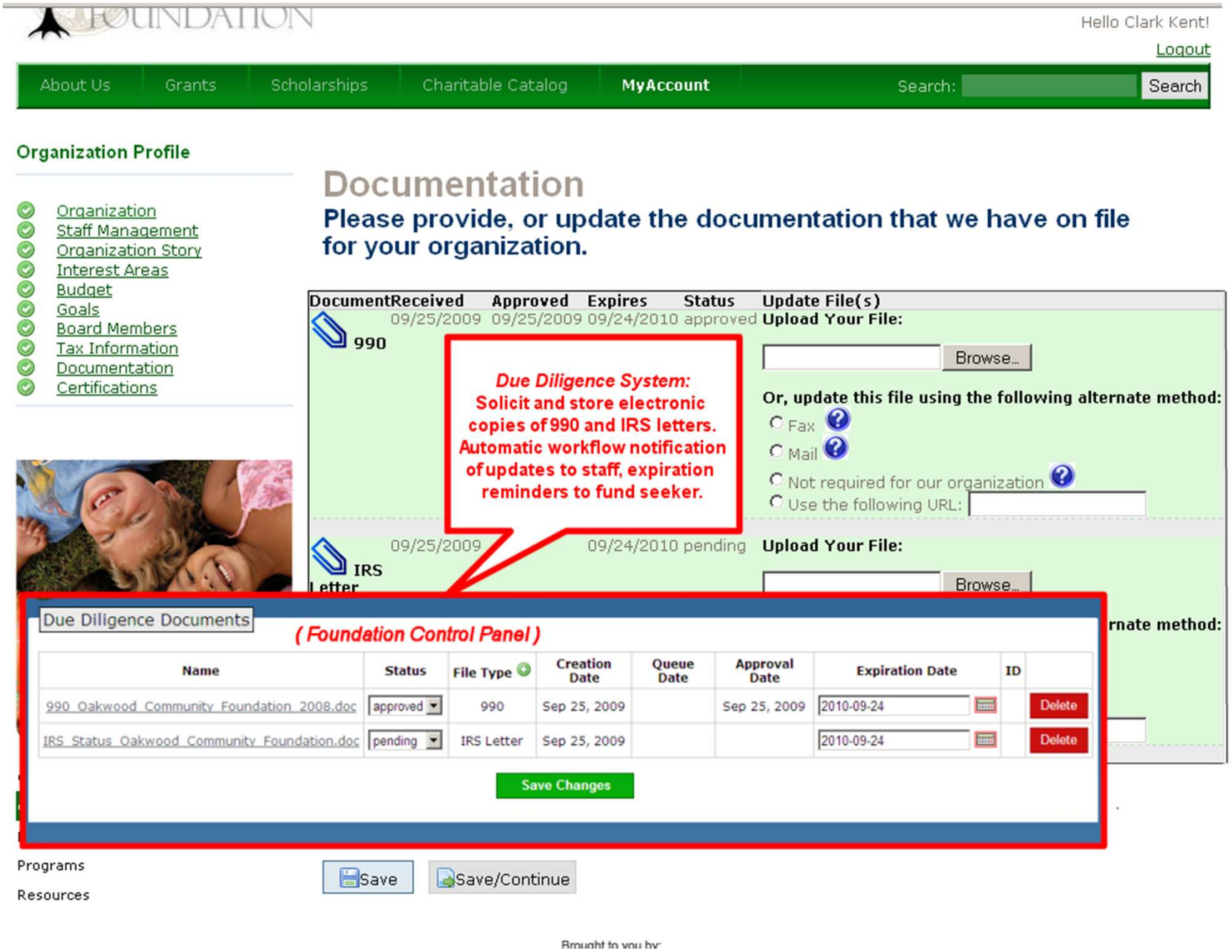
ChesterCAP LLC

Seamless Solutions in Philanthropy

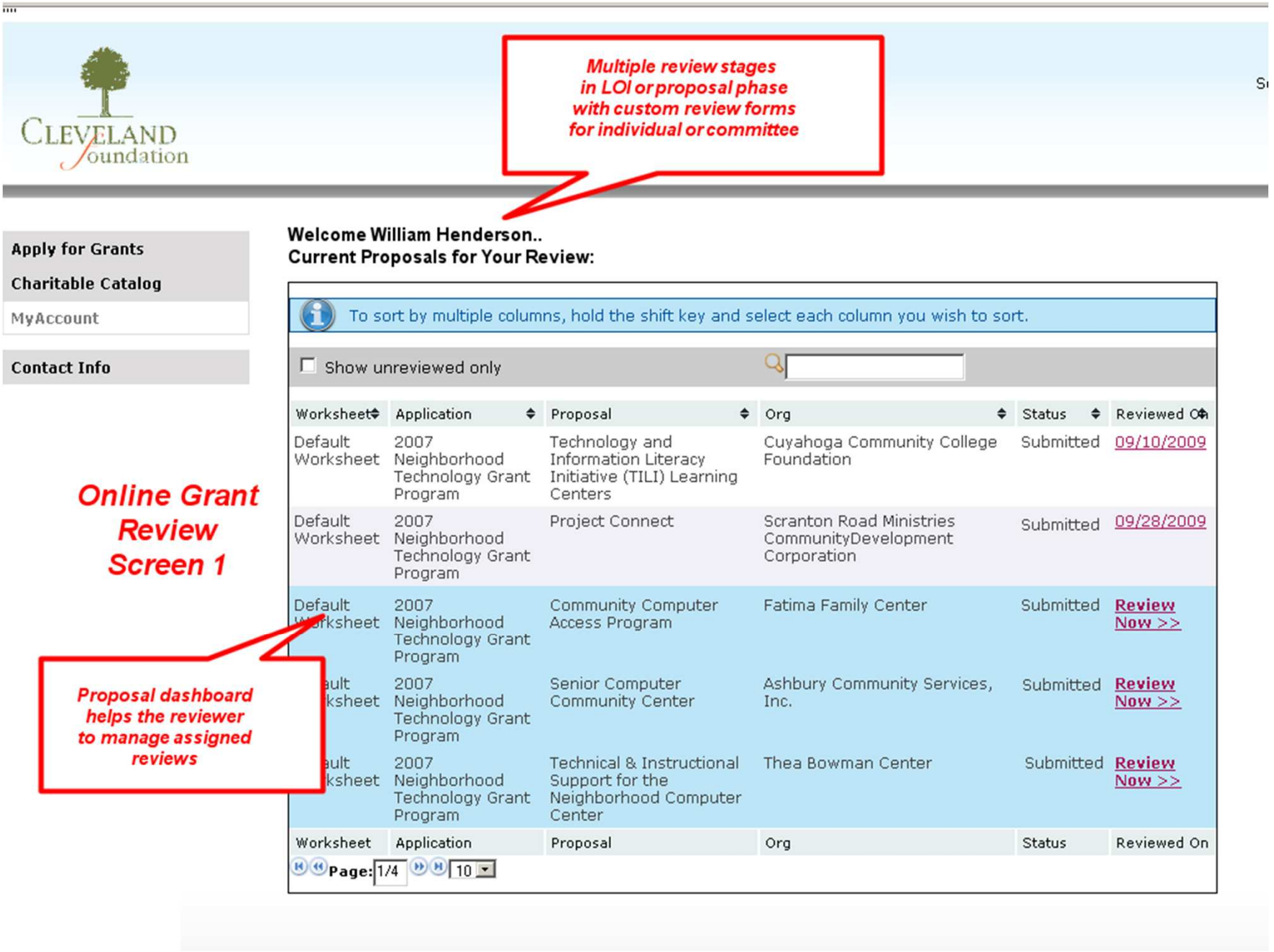
Dotche™
OLGA
Online Donor Services
Content Management System (CMS)
Philanthropic Back Office (PBO)
Charitable Advisor Platform (CAP)



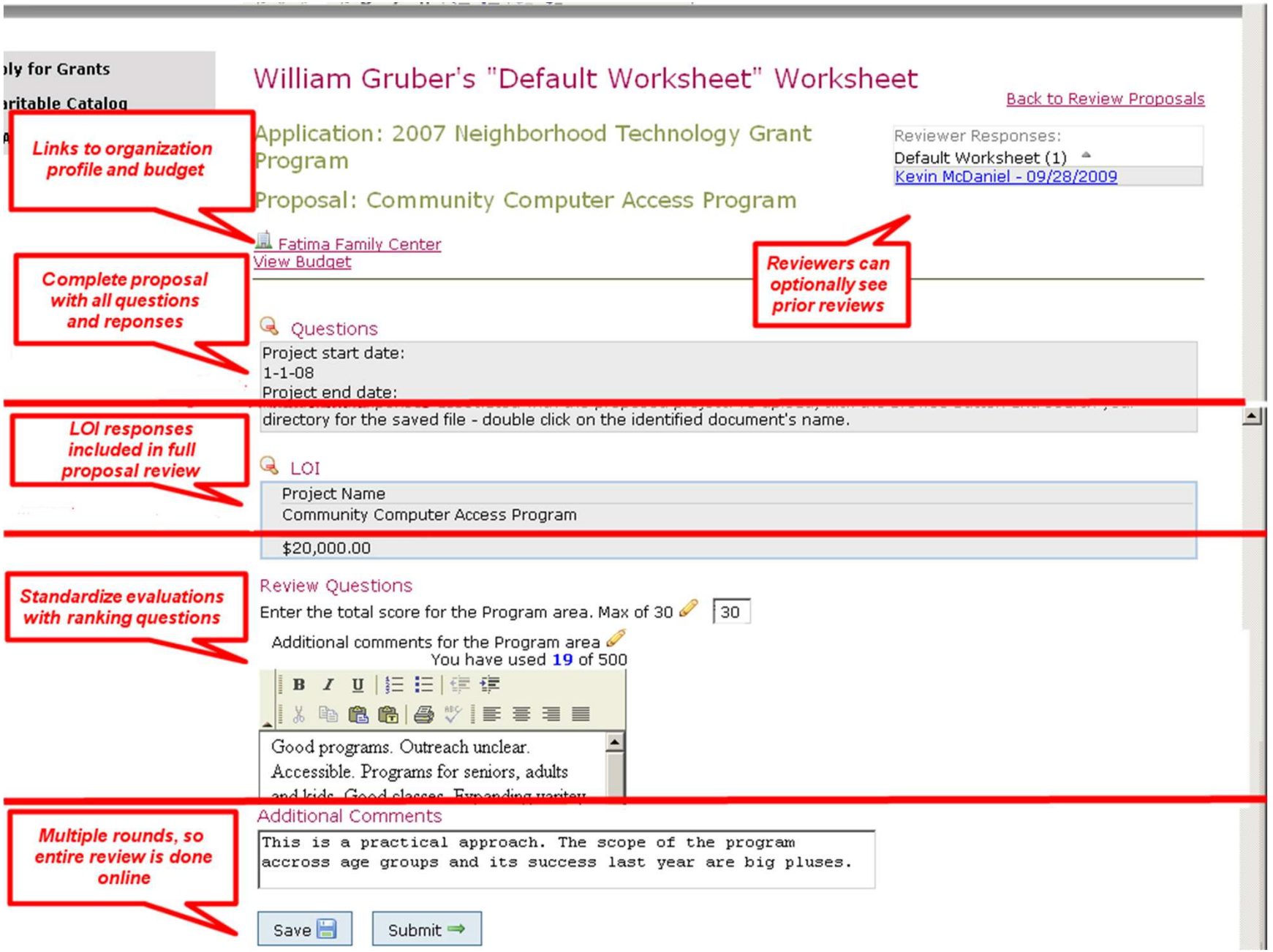
Grant Recommendation Worksheet



Due Diligence



Grant Review - 1

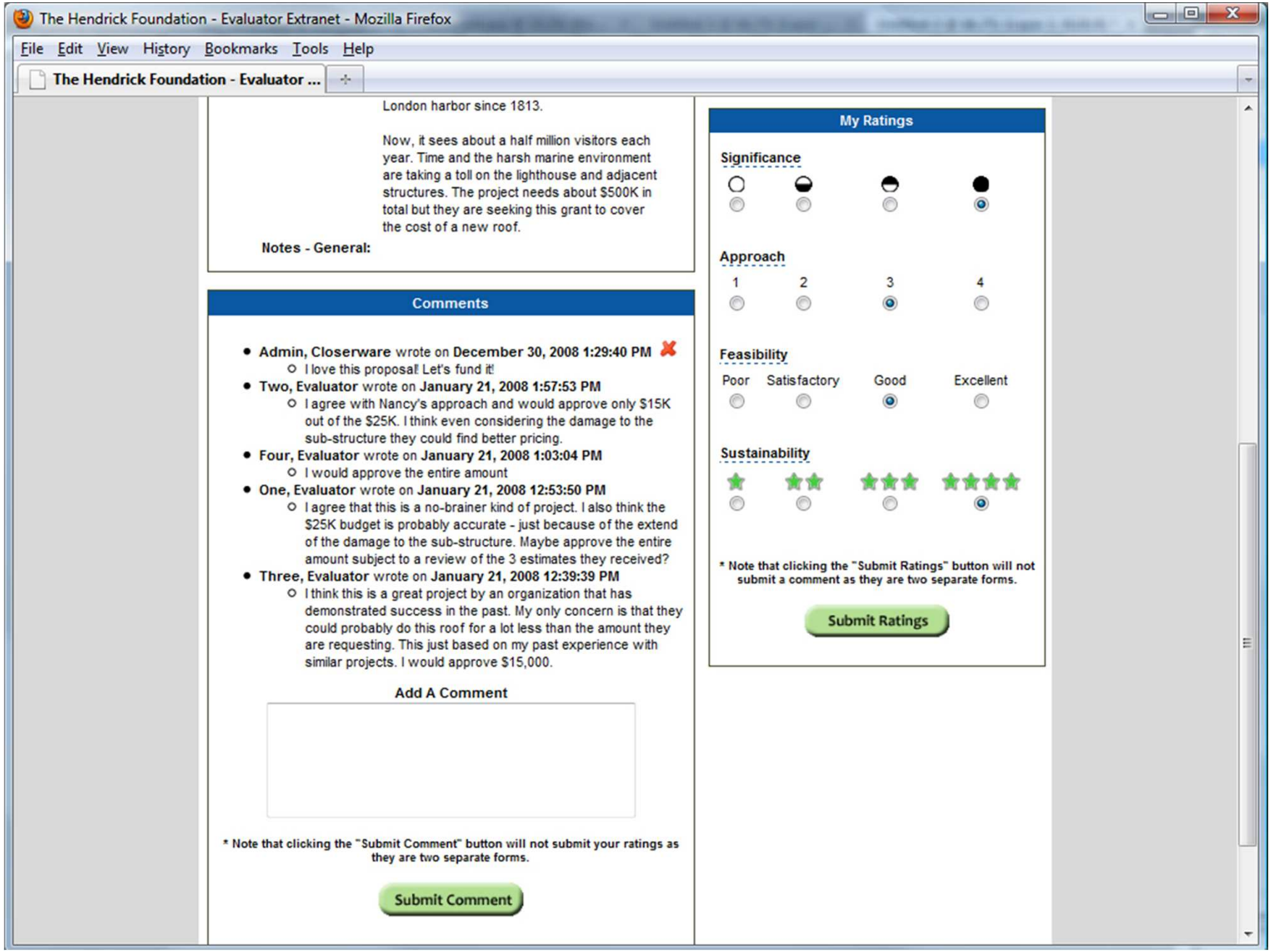


Grant Review – 2

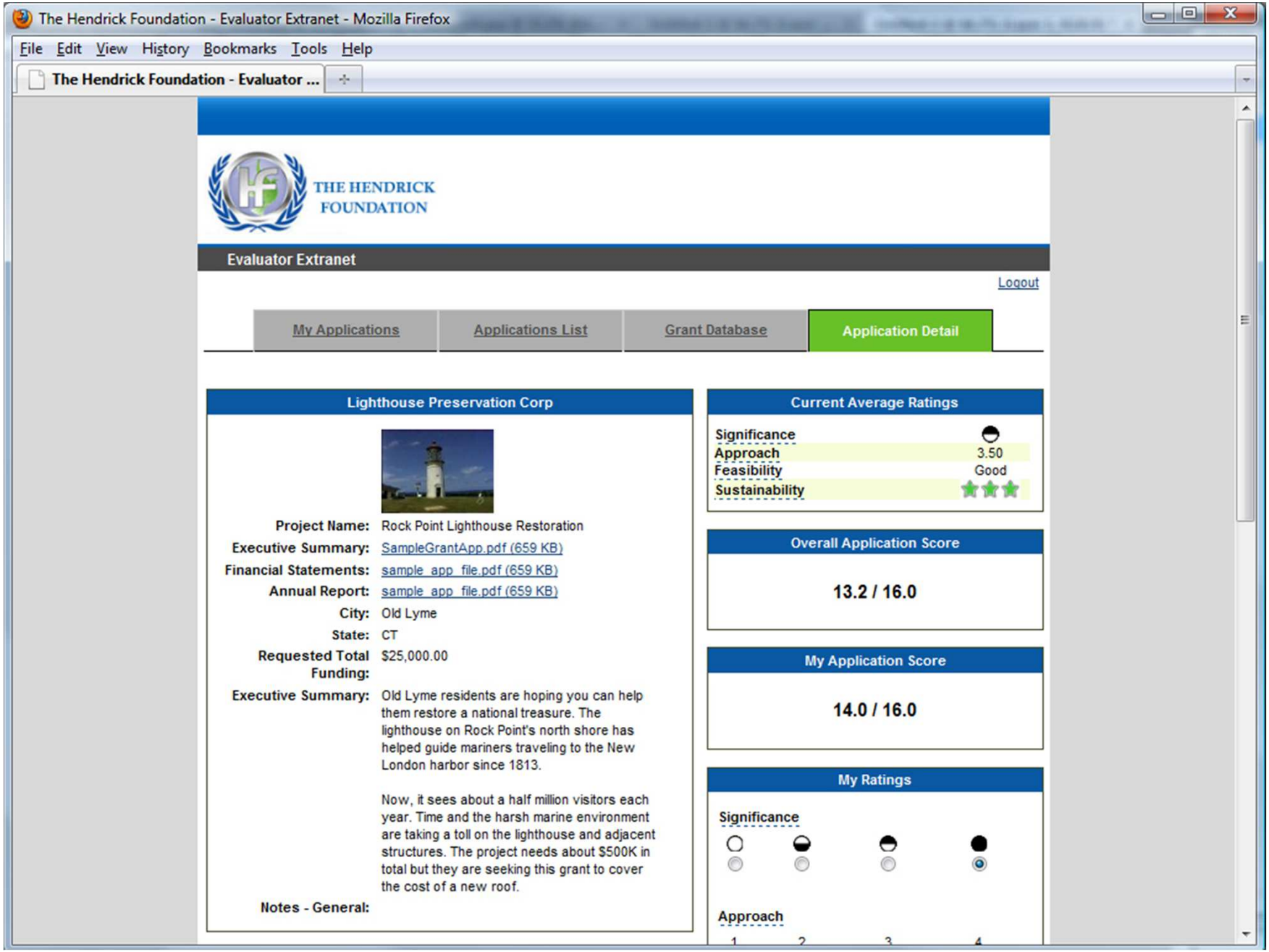
closerware bringing you closer

GrantMaker

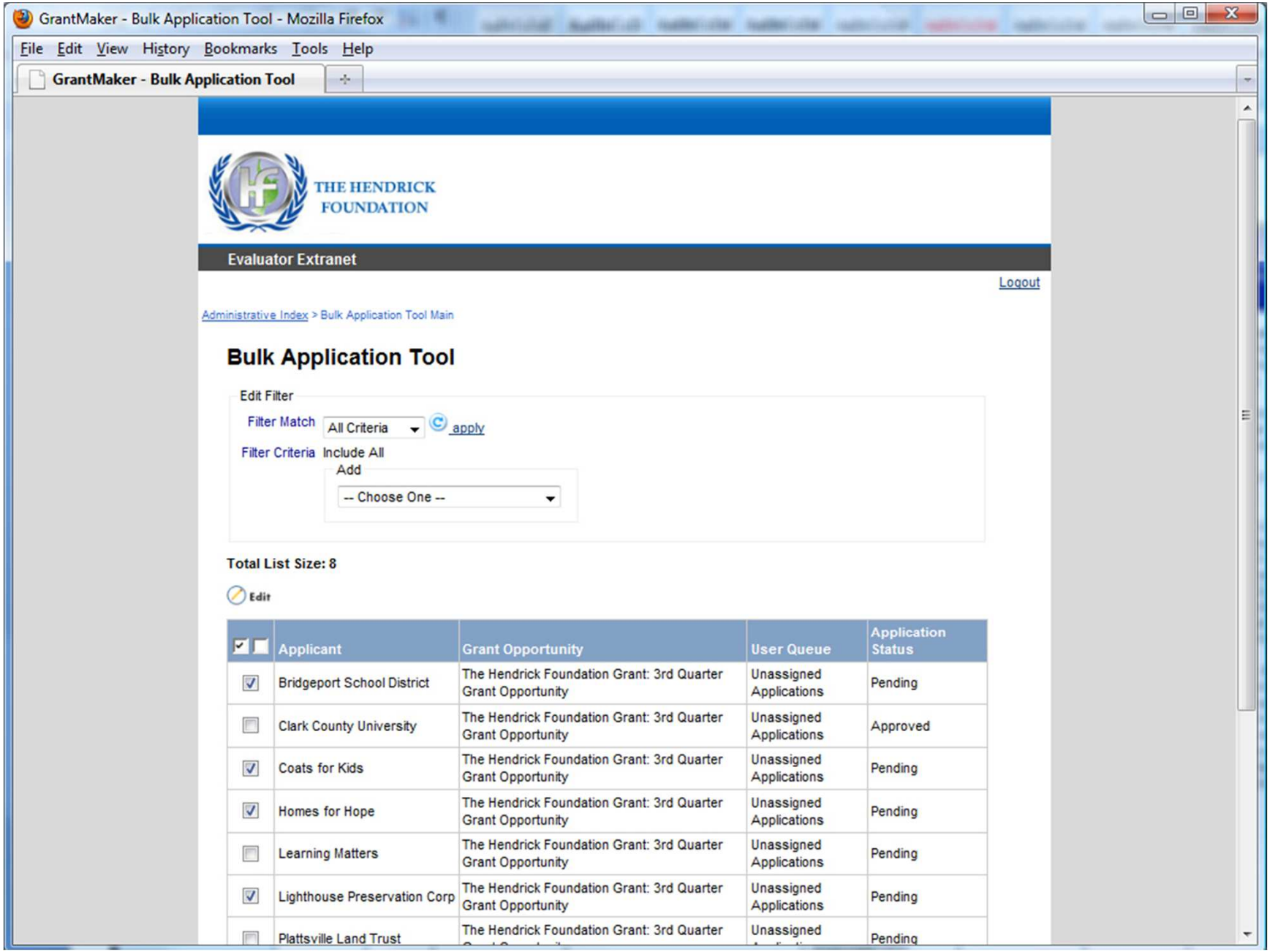
Generate Intake Form



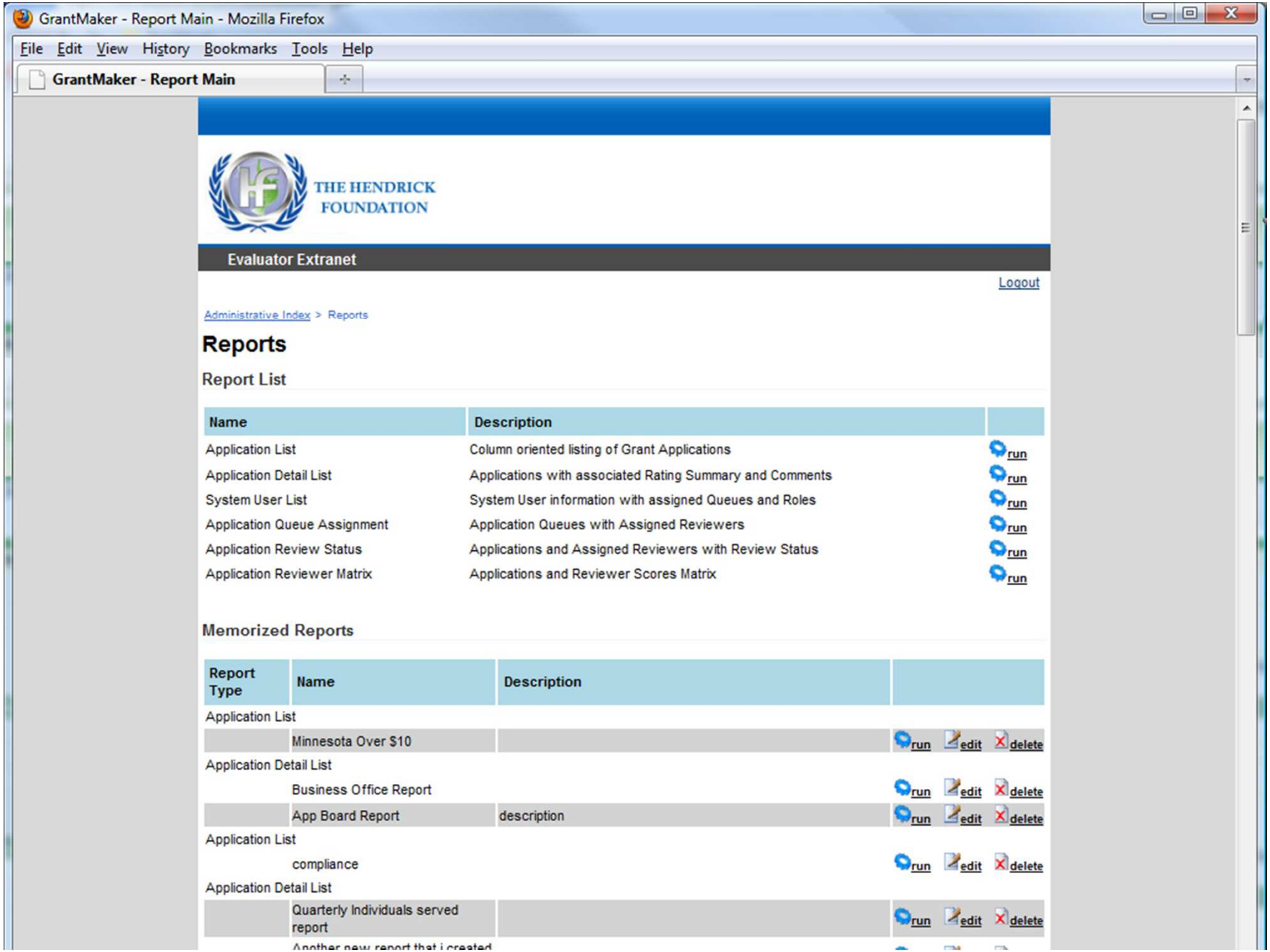
Online Application Comment Rating



Online Application Review



Bulk Application Tool



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

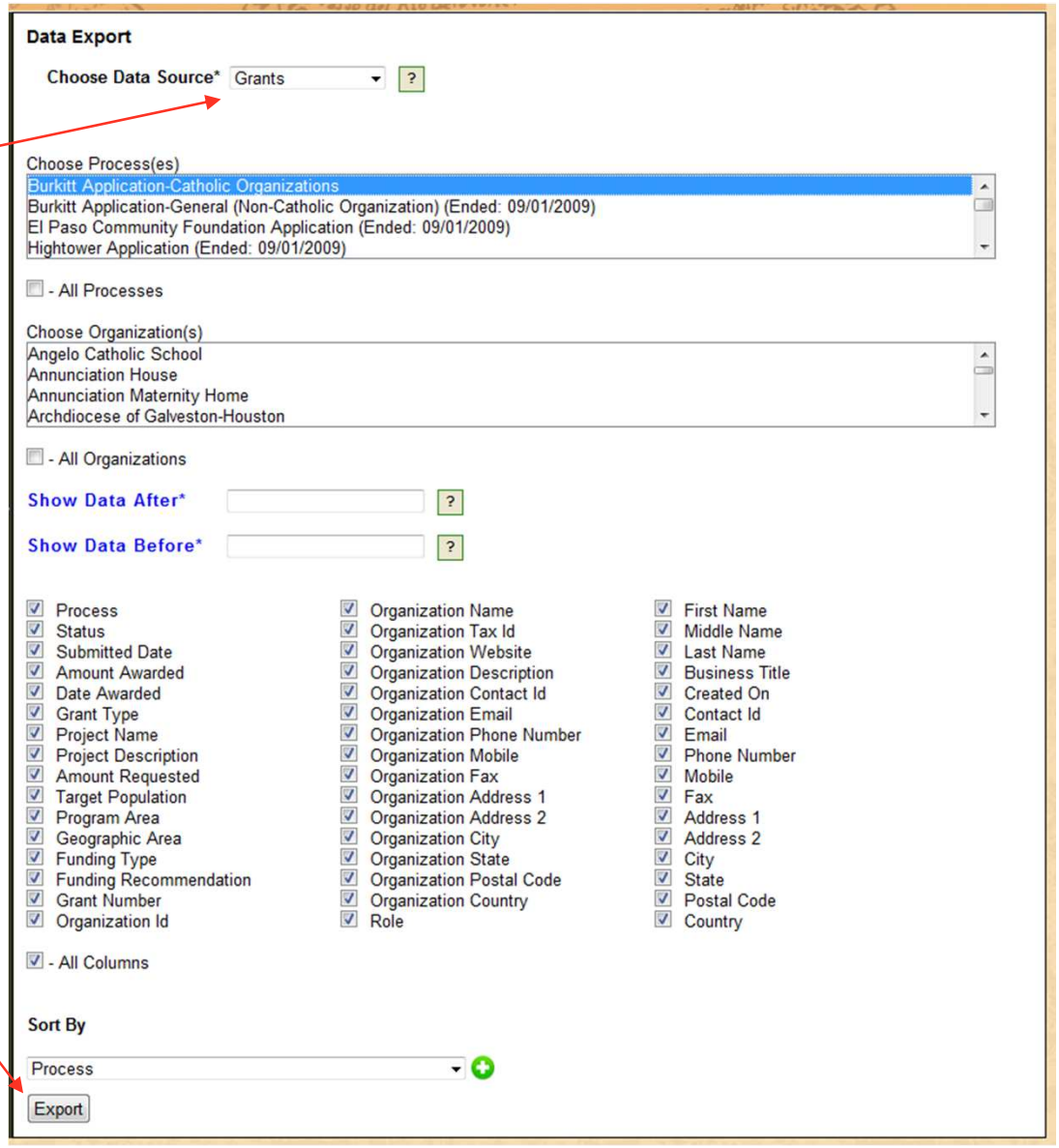
Grant LifeCycle Manager (GLM)
FaxToFile optional add-on

Data Export

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

2. Set filter parameters

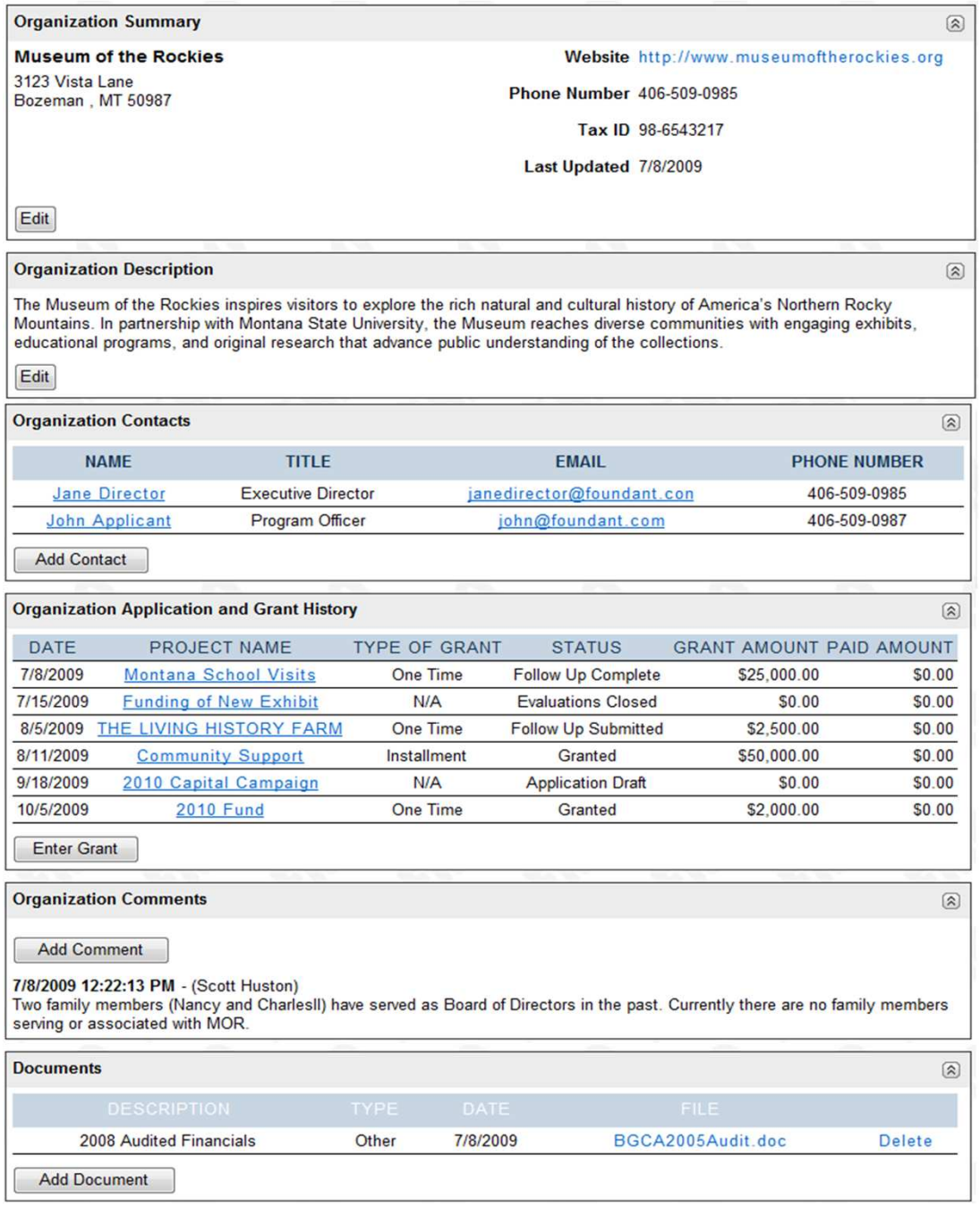
3. Generate csv/Excel file



Organization Summary Page

View entire relationship with grantees via single page:

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



Organization Summary

Museum of the Rockies
3123 Vista Lane
Bozeman , MT 50987

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

Edit

Organization Description

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

Edit

Organization Contacts

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

Add Contact

Organization Application and Grant History

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

Enter Grant

Organization Comments

Add Comment

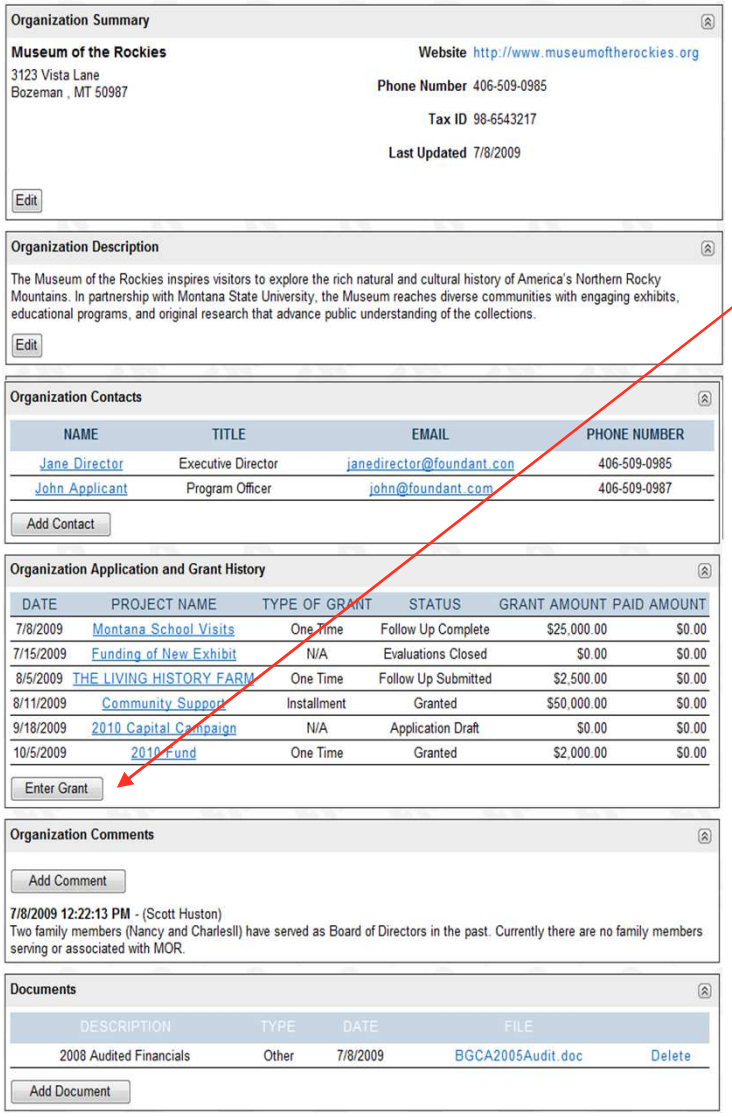
7/8/2009 12:22:13 PM - (Scott Huston)
Two family members (Nancy and CharlesII) have served as Board of Directors in the past. Currently there are no family members serving or associated with MOR.

Documents

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

Add Document

Manual Grant Entry



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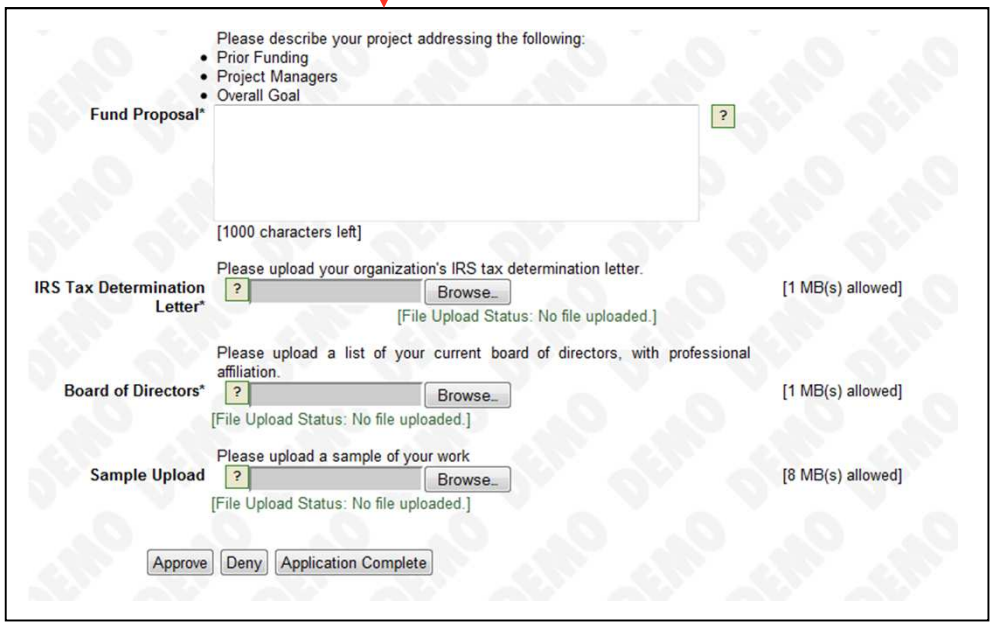
Documents

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

Add Document

1. Manually enter grants not initiated through online applications

2. Design fully customized forms to capture desired data



Please describe your project addressing the following:
- Prior Funding
- Project Managers
- Overall Goal

Fund Proposal*

[1000 characters left]

Please upload your organization's IRS tax determination letter.
IRS Tax Determination Letter* Browse... [1 MB(s) allowed]
[File Upload Status: No file uploaded.]

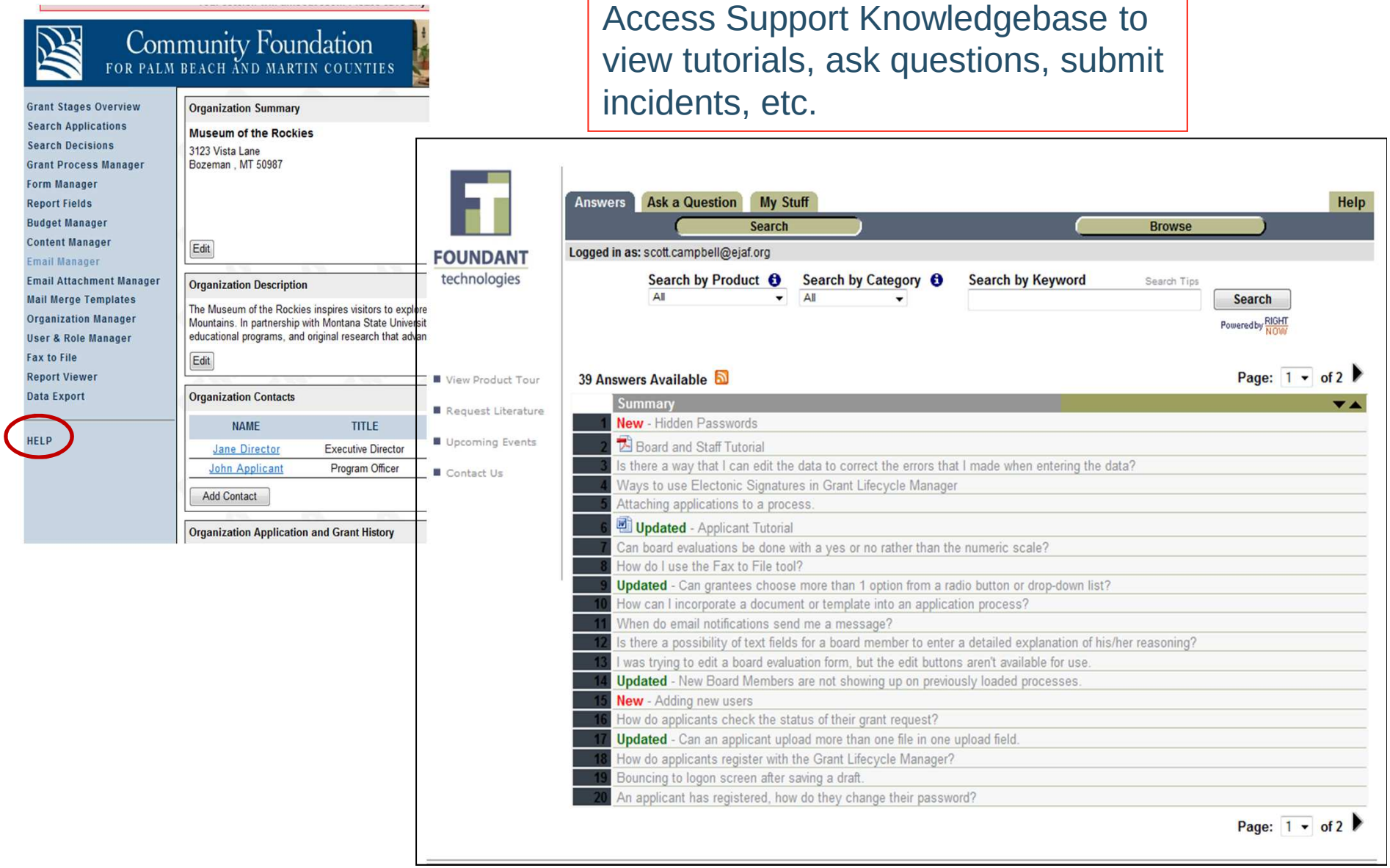
Please upload a list of your current board of directors, with professional affiliation.
Board of Directors* Browse... [1 MB(s) allowed]
[File Upload Status: No file uploaded.]

Please upload a sample of your work
Sample Upload Browse... [8 MB(s) allowed]
[File Upload Status: No file uploaded.]

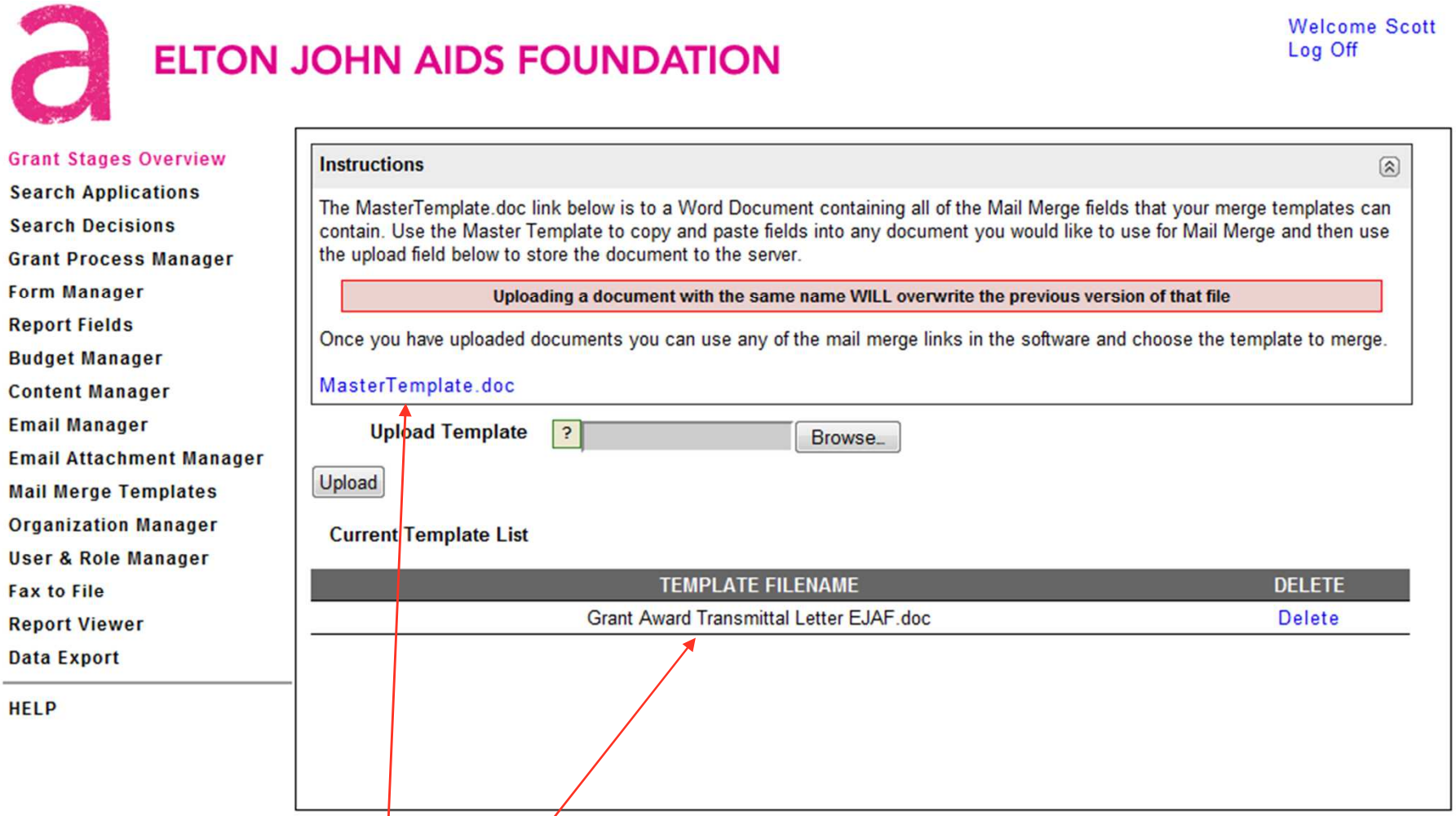
Approve | Deny | Application Complete

Knowledgebase Directly Integrated to Software

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

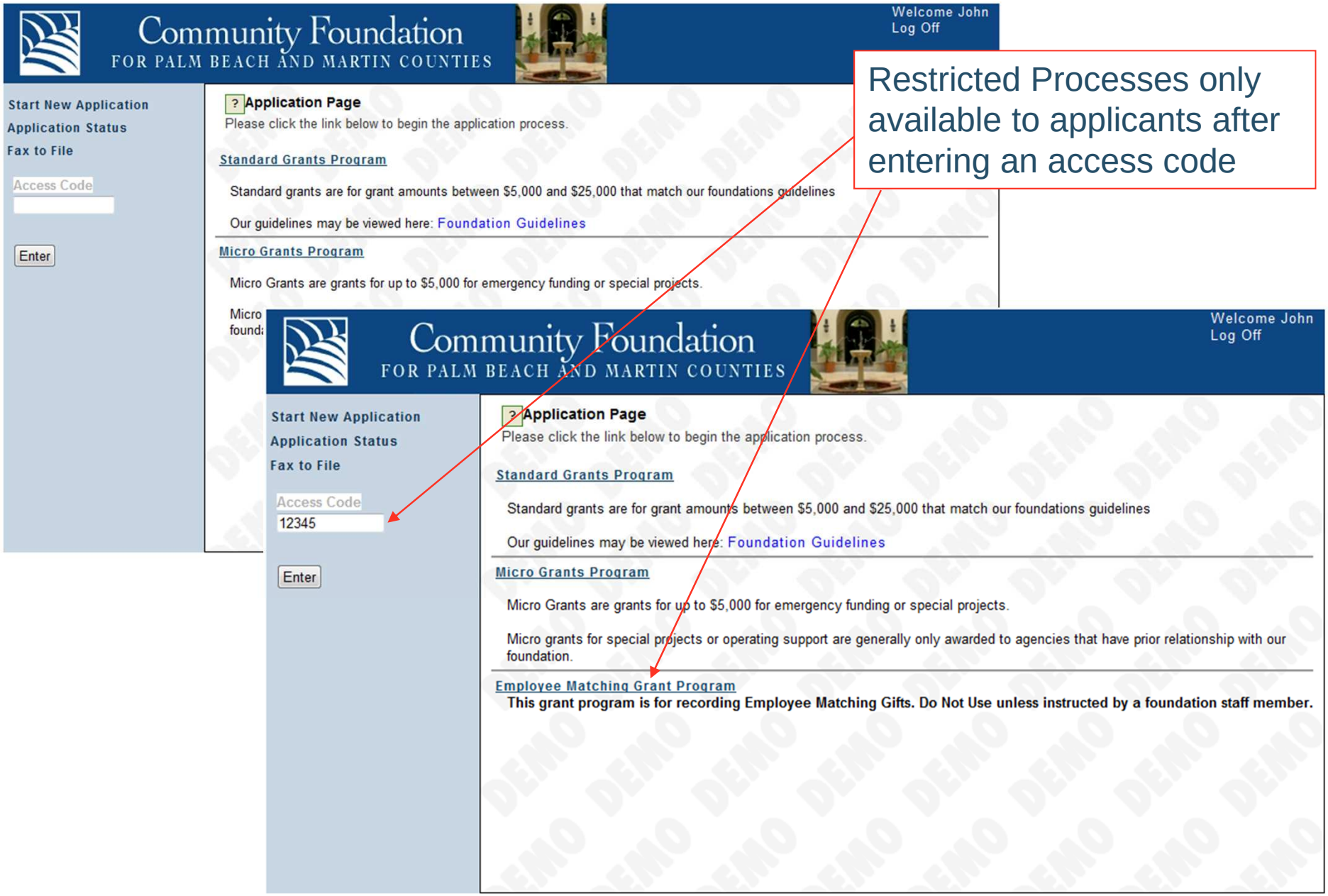


Mailmerge

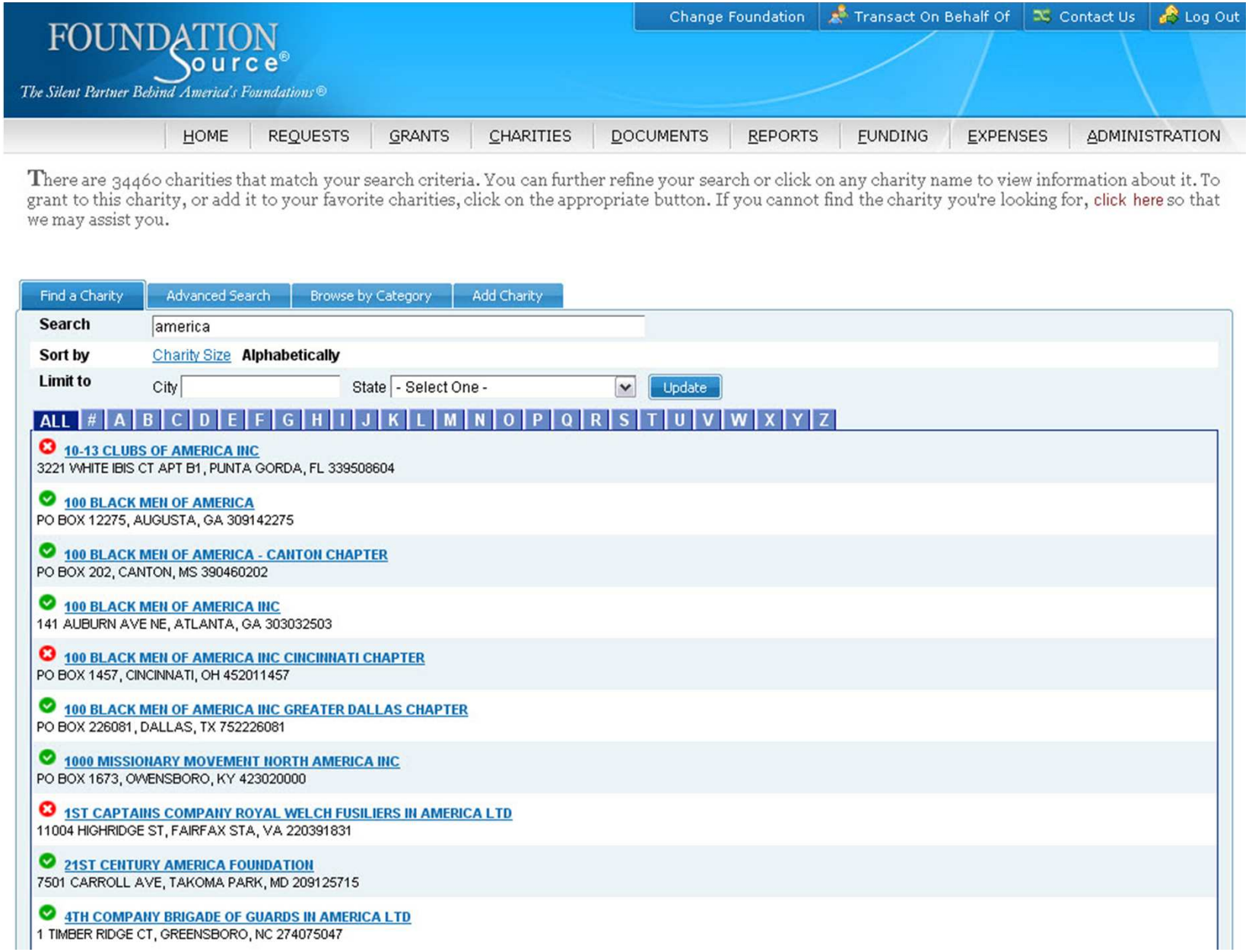


Create unlimited merge templates for use in bulk or individual correspondence

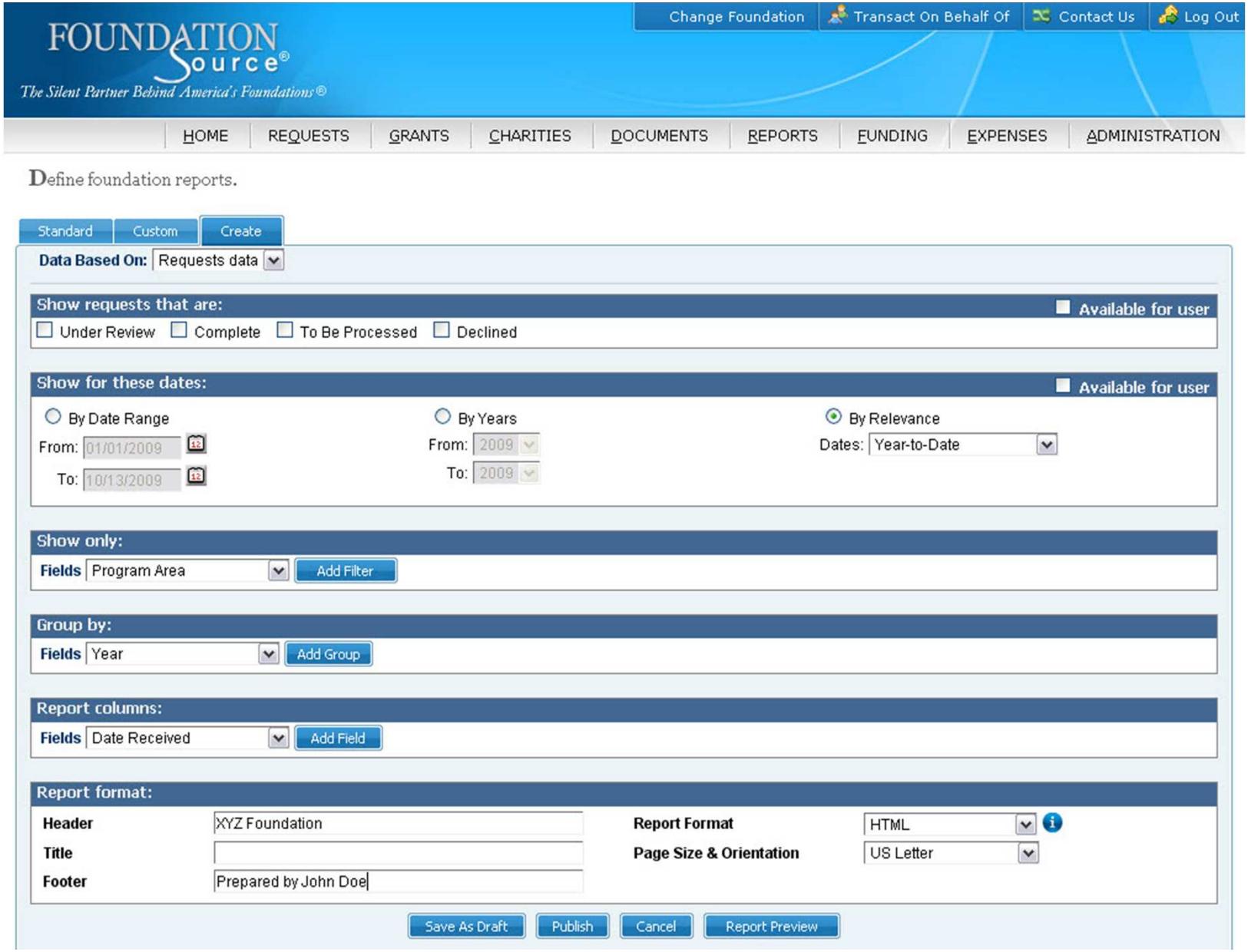
Restricted Processes



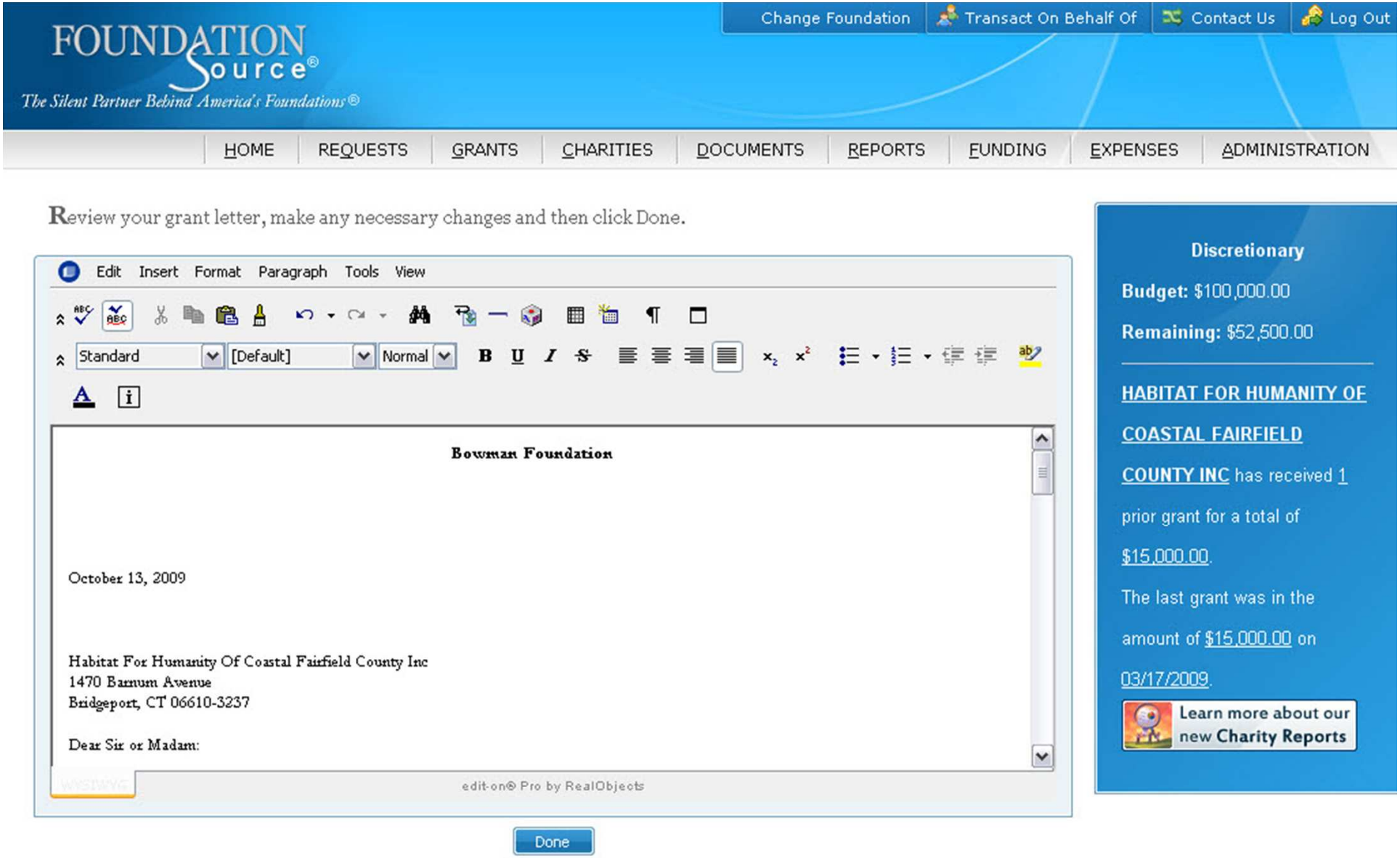
Foundation Source Back Office®
Foundation Source Client Services™
Foundation Source Online®
Foundation Source Requests®
Foundation Source Advisors
Foundation Source Program Office



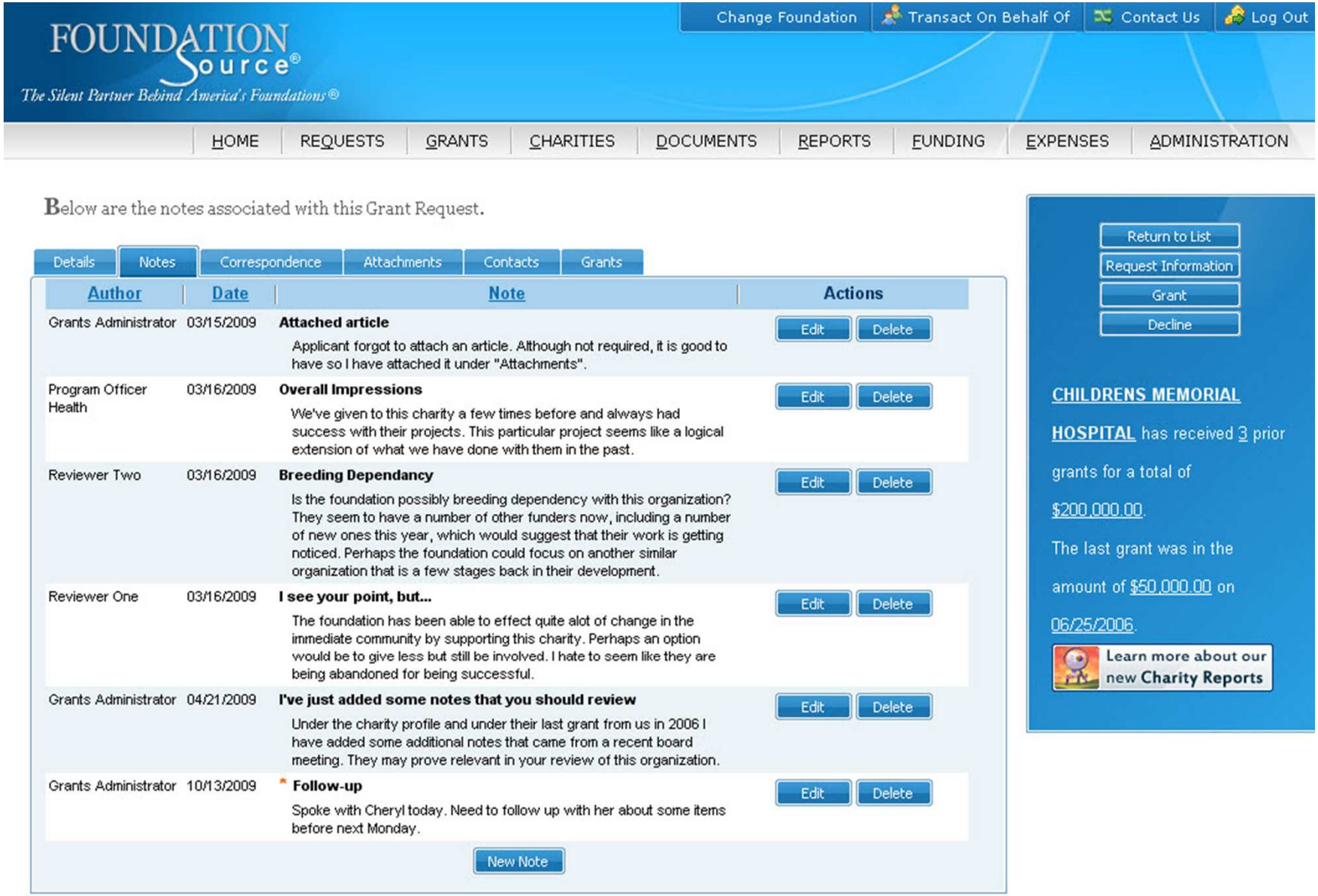
Charity Icons



Custom Report Tool



Edit Grant Letter


FOUNDATION Source®
The Silent Partner Behind America's Foundations®
Change Foundation
Transact On Behalf Of
Contact Us
Log Out
HOME
REQUESTS
GRANTS
CHARITIES
DOCUMENTS
REPORTS
FUNDING
EXPENSES
ADMINISTRATION
Below are the notes associated with this Grant Request.
Details
Notes
Correspondence
Attachments
Contacts
Grants
Author
Date
Note
Actions
Grants Administrator 03/15/2009 Attached article
Applicant forgot to attach an article. Although not required, it is good to have so I have attached it under "Attachments".
Edit
Delete
Program Officer Health 03/16/2009 Overall Impressions
We've given to this charity a few times before and always had success with their projects. This particular project seems like a logical extension of what we have done with them in the past.
Edit
Delete
Reviewer Two 03/16/2009 Breeding Dependancy
Is the foundation possibly breeding dependency with this organization? They seem to have a number of other funders now, including a number of new ones this year, which would suggest that their work is getting noticed. Perhaps the foundation could focus on another similar organization that is a few stages back in their development.
Edit
Delete
Reviewer One 03/16/2009 I see your point, but...
The foundation has been able to effect quite alot of change in the immediate community by supporting this charity. Perhaps an option would be to give less but still be involved. I hate to seem like they are being abandoned for being successful.
Edit
Delete
Grants Administrator 04/21/2009 I've just added some notes that you should review
Under the charity profile and under their last grant from us in 2006 I have added some additional notes that came from a recent board meeting. They may prove relevant in your review of this organization.
Edit
Delete
Grants Administrator 10/13/2009 * Follow-up
Spoke with Cheryl today. Need to follow up with her about some items before next Monday.
Edit
Delete
New Note
Return to List
Request Information
Grant
Decline
CHILDRENS MEMORIAL HOSPITAL has received 3 prior grants for a total of $200,000.00.
The last grant was in the amount of $50,000.00 on 06/25/2006.
Learn more about our new Charity Reports

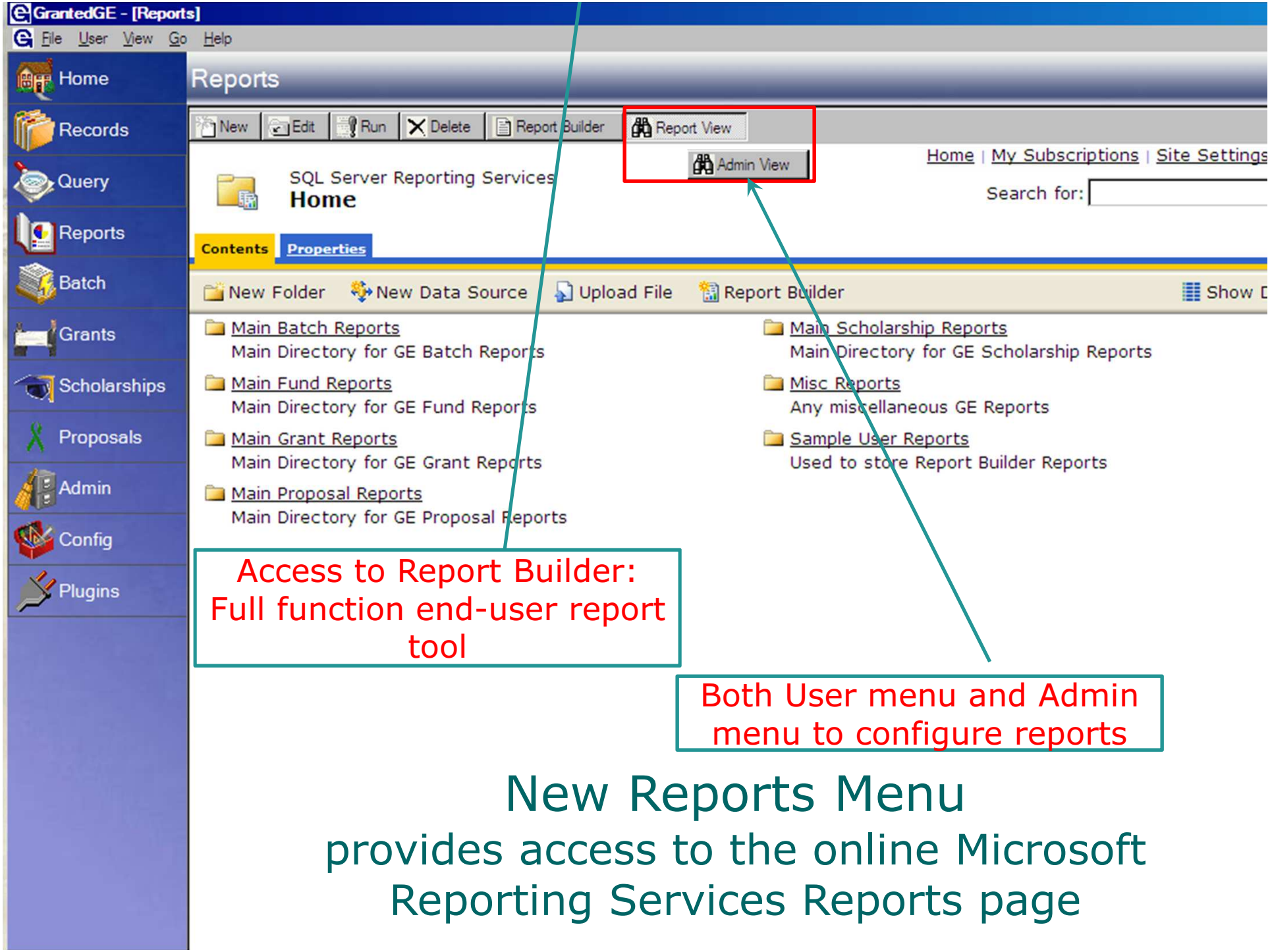
Notes

Foundation Source Developments for 4Q 2009 and 2010

- Foundation Source Results

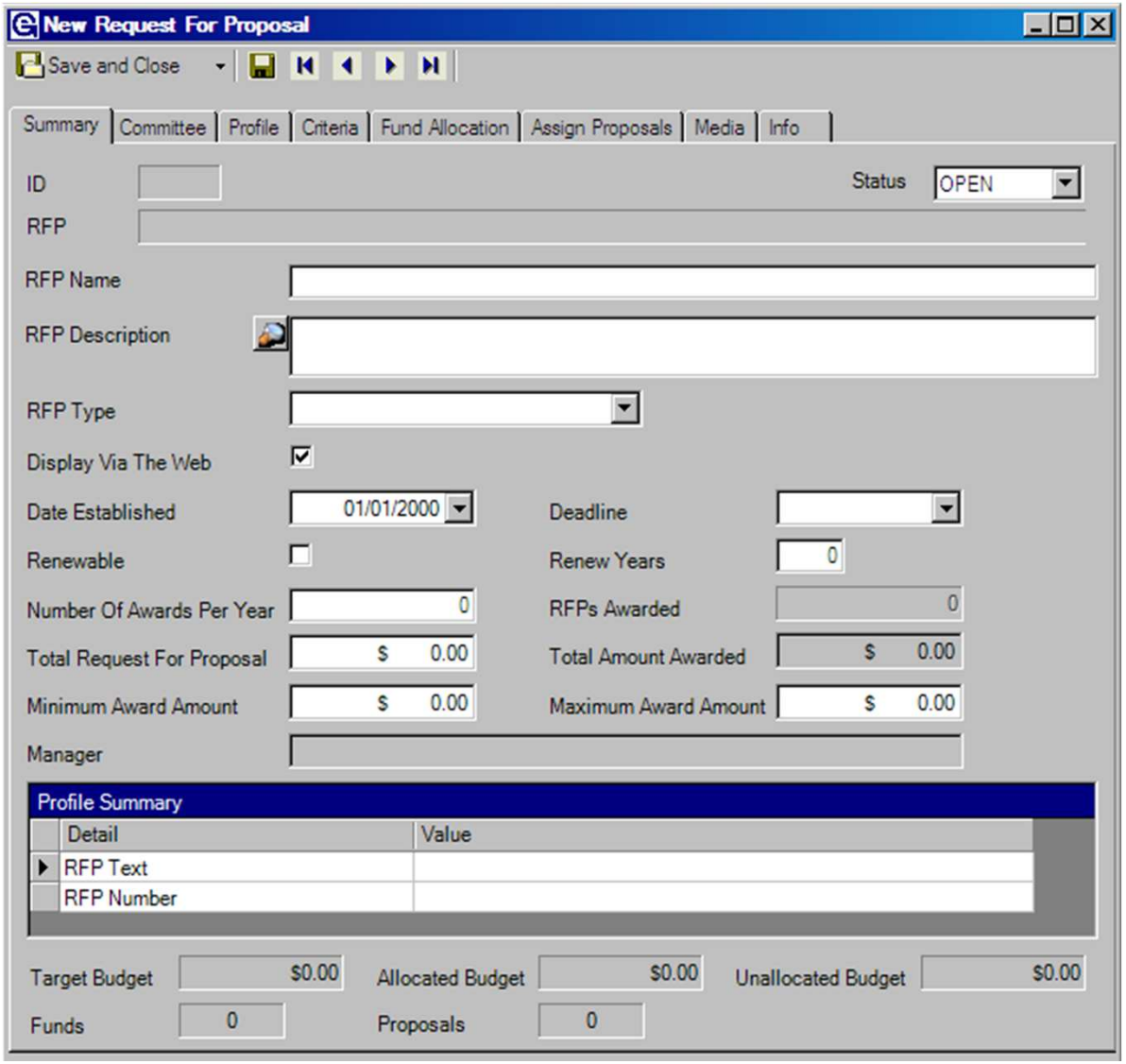
  A performance monitoring and reporting system that allows foundations to measure the effectiveness of their grantmaking.

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



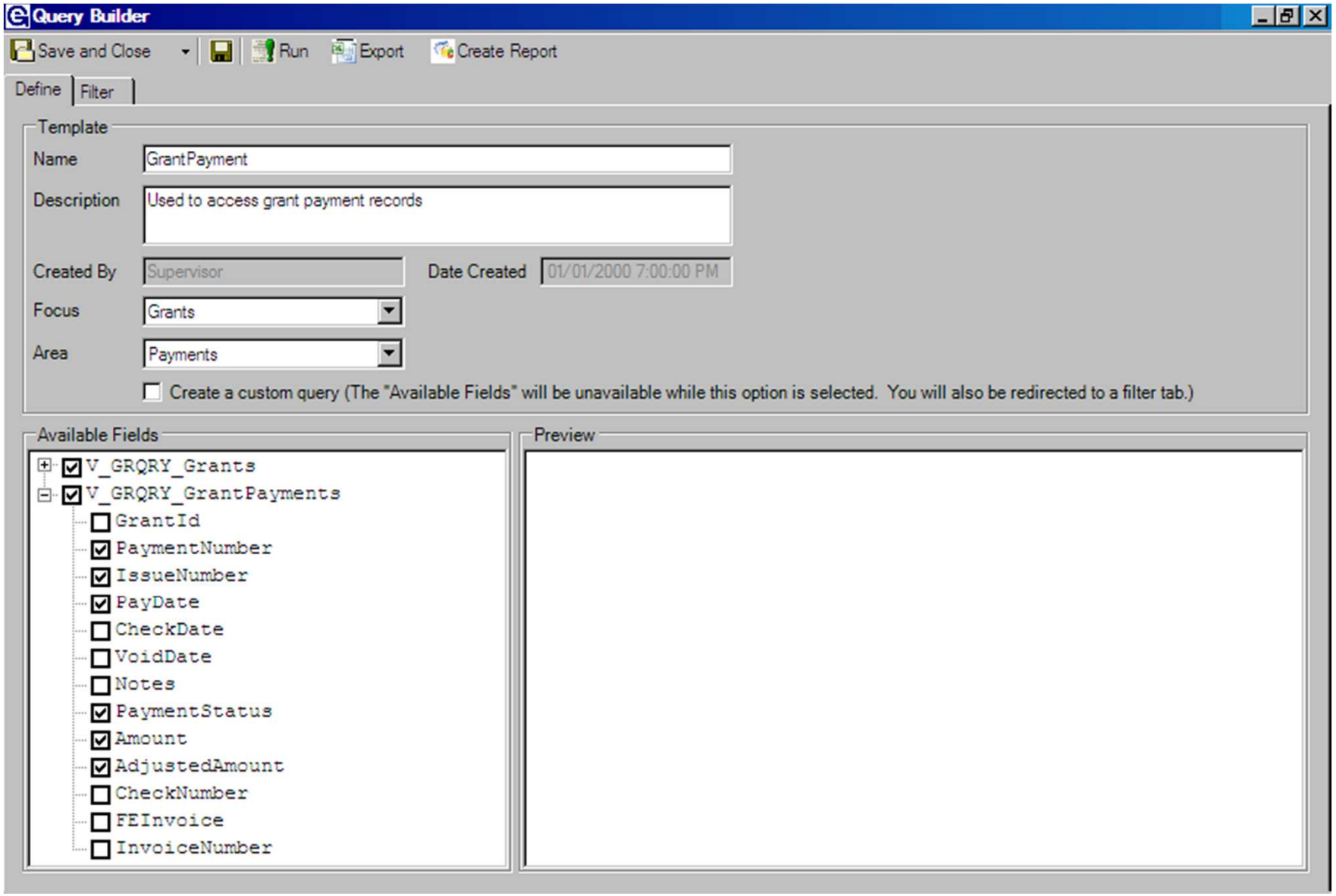
New Reports Menu

provides access to the online Microsoft Reporting Services Reports page



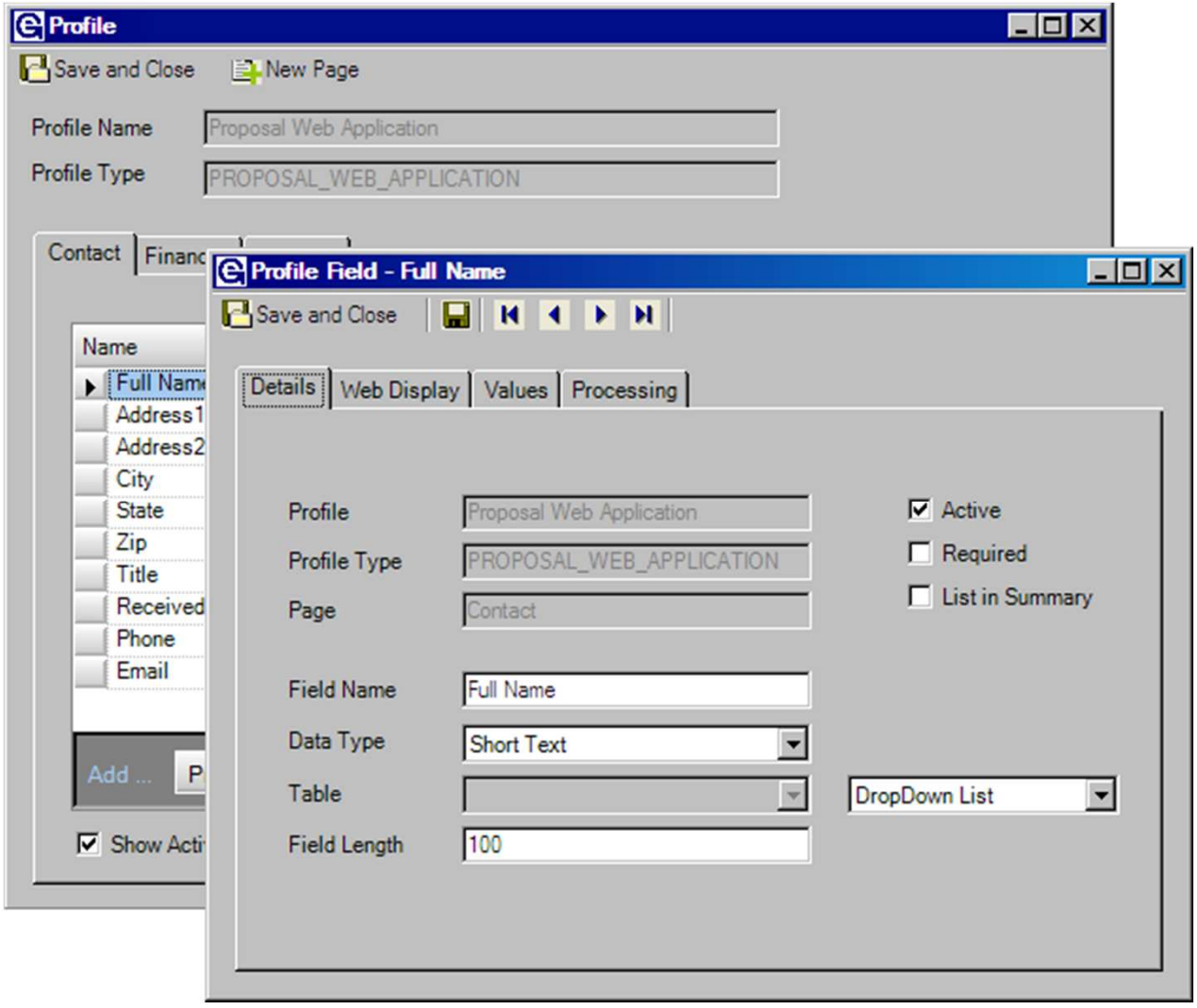
New Request For Proposal Definition Screen

allows users to define an RFP that can be published to the web and also used to group proposals when they are submitted.



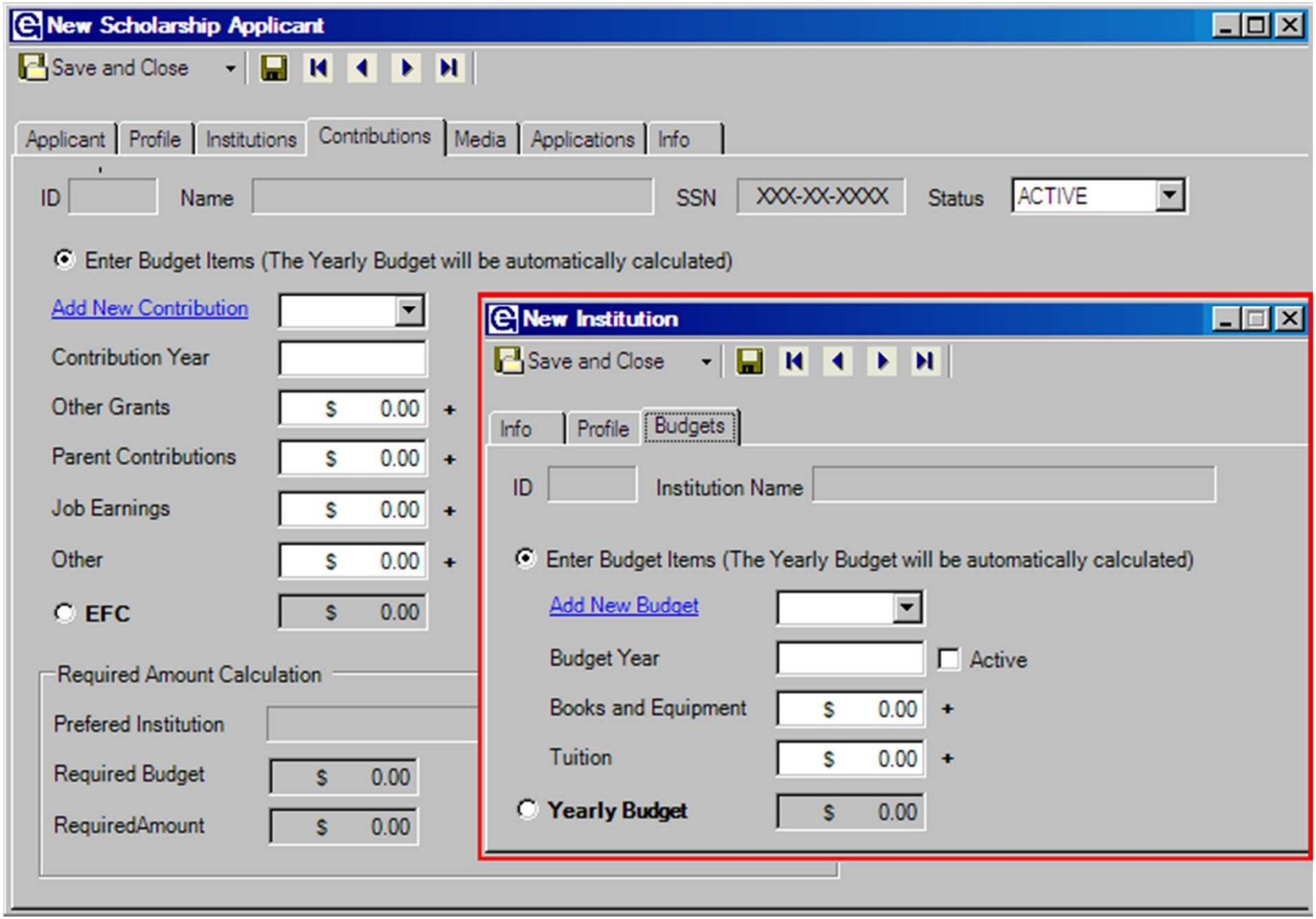
New Query Functions

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



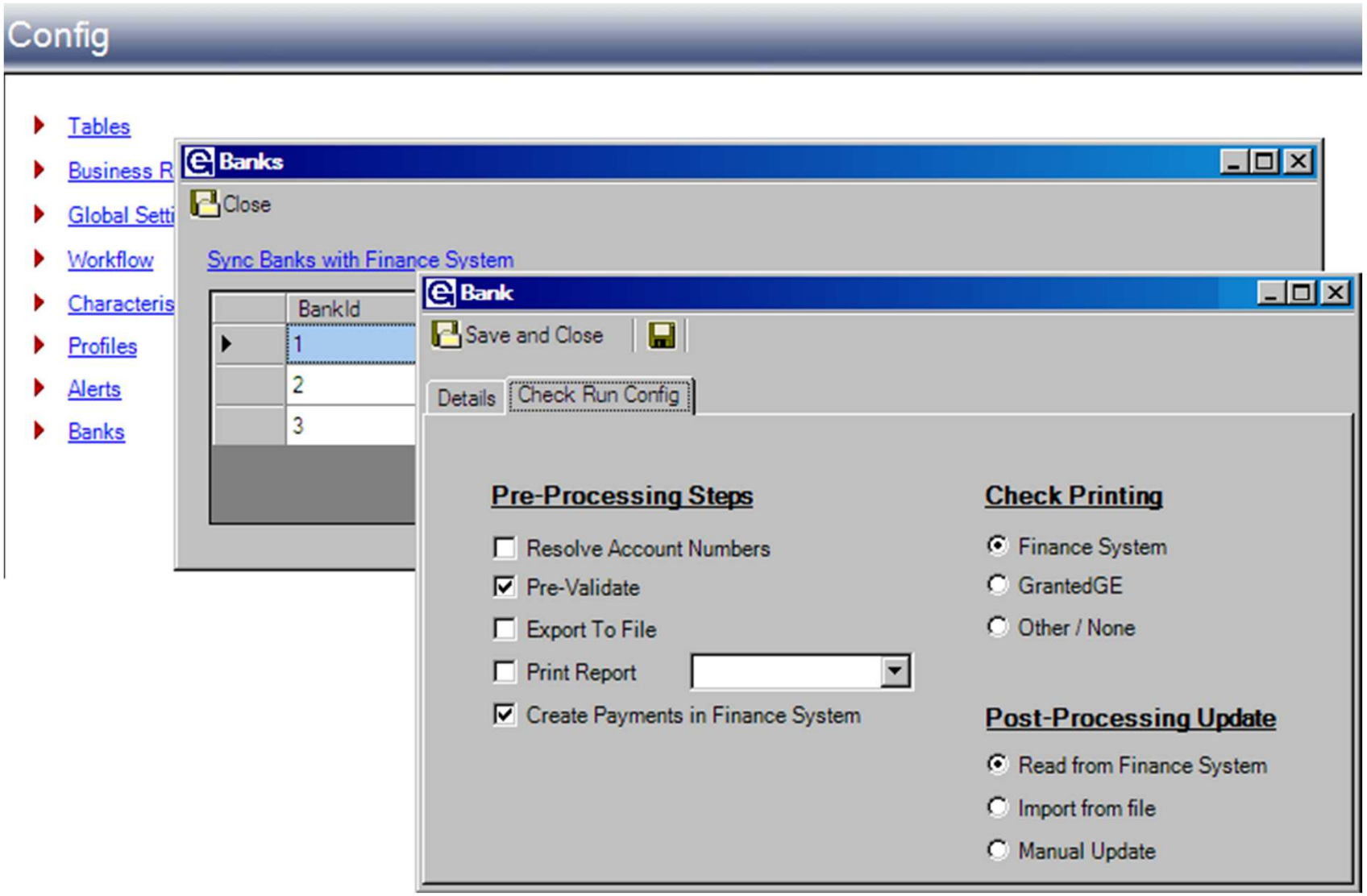
New ‘Profile’ Functionality

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 'Budget' Functionality

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



New Bank Configuration Features

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

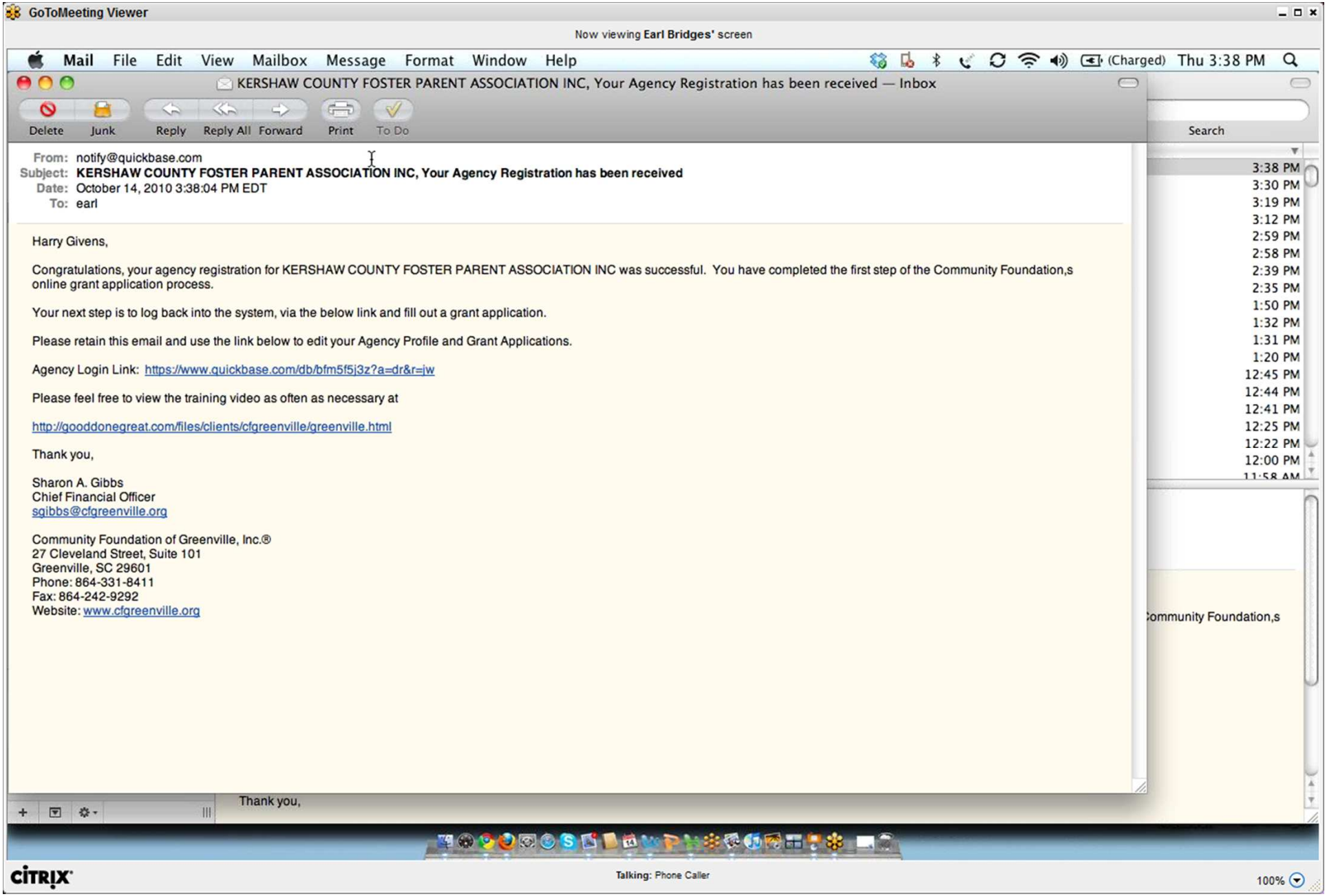
GrantedGE Developments for 4Q 2009 and 2010

- 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.

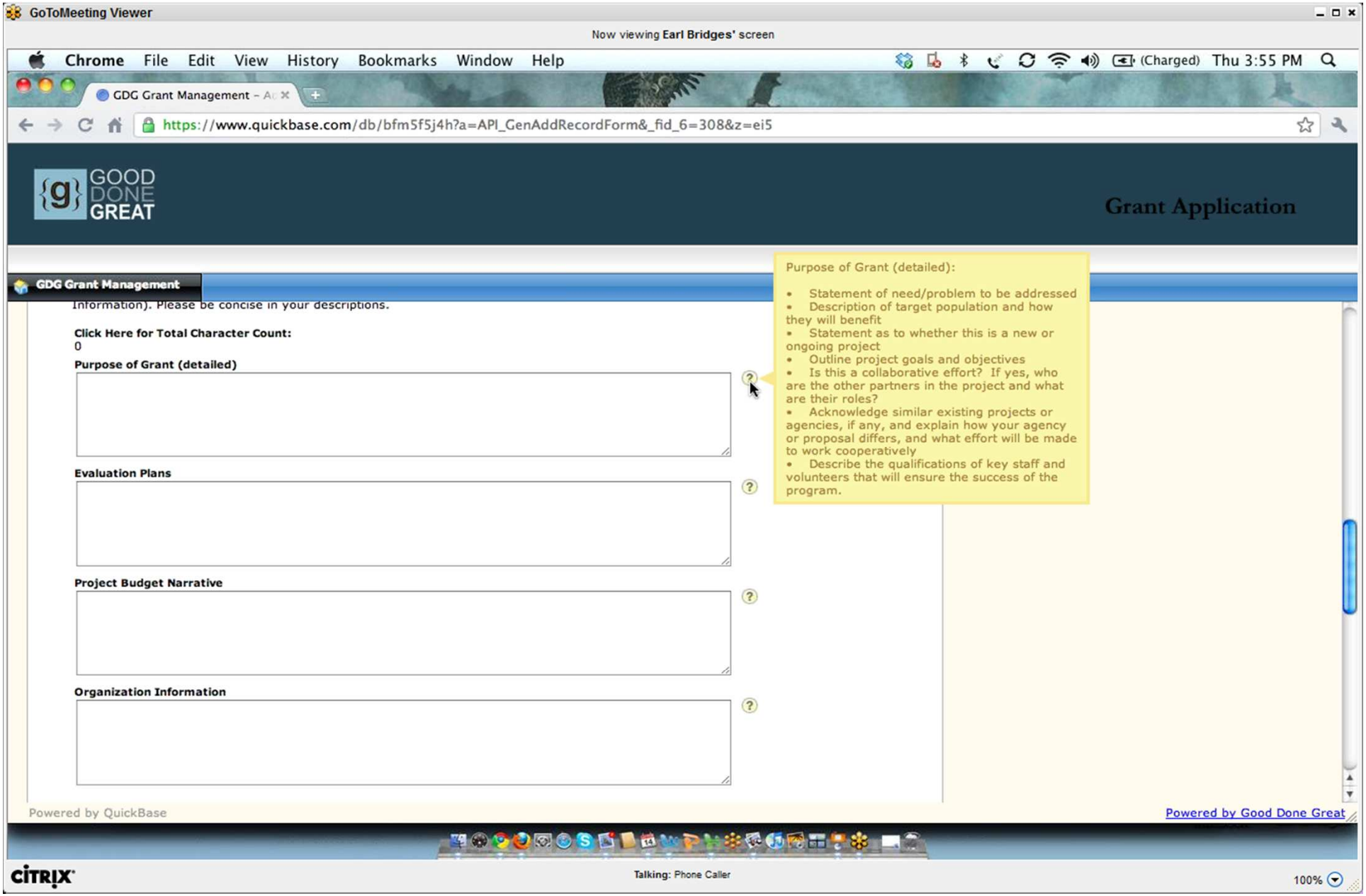
GrantedGE Web Development for 4Q 2009 and 2010

- 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.

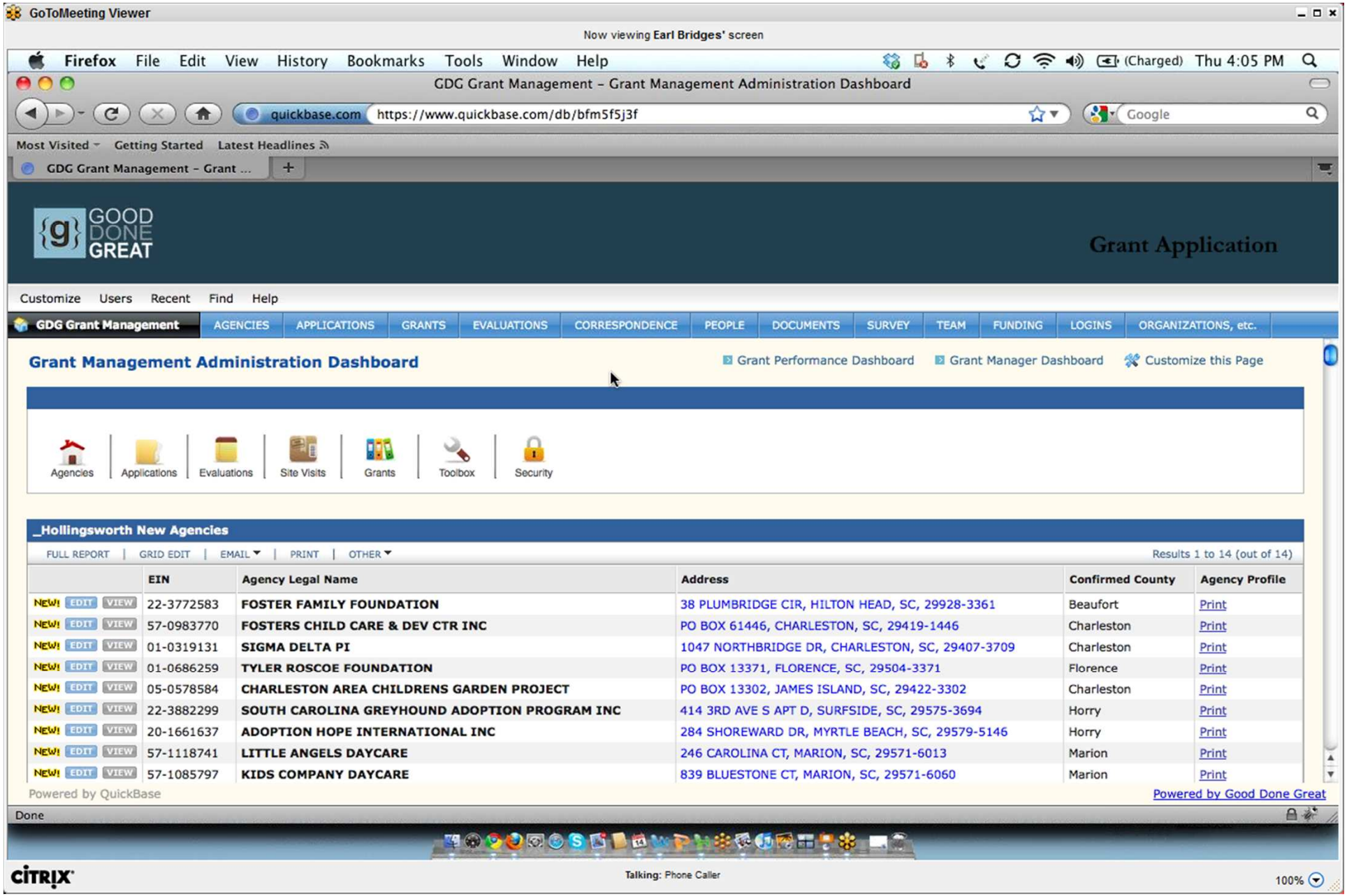
Grant Management for Foundations



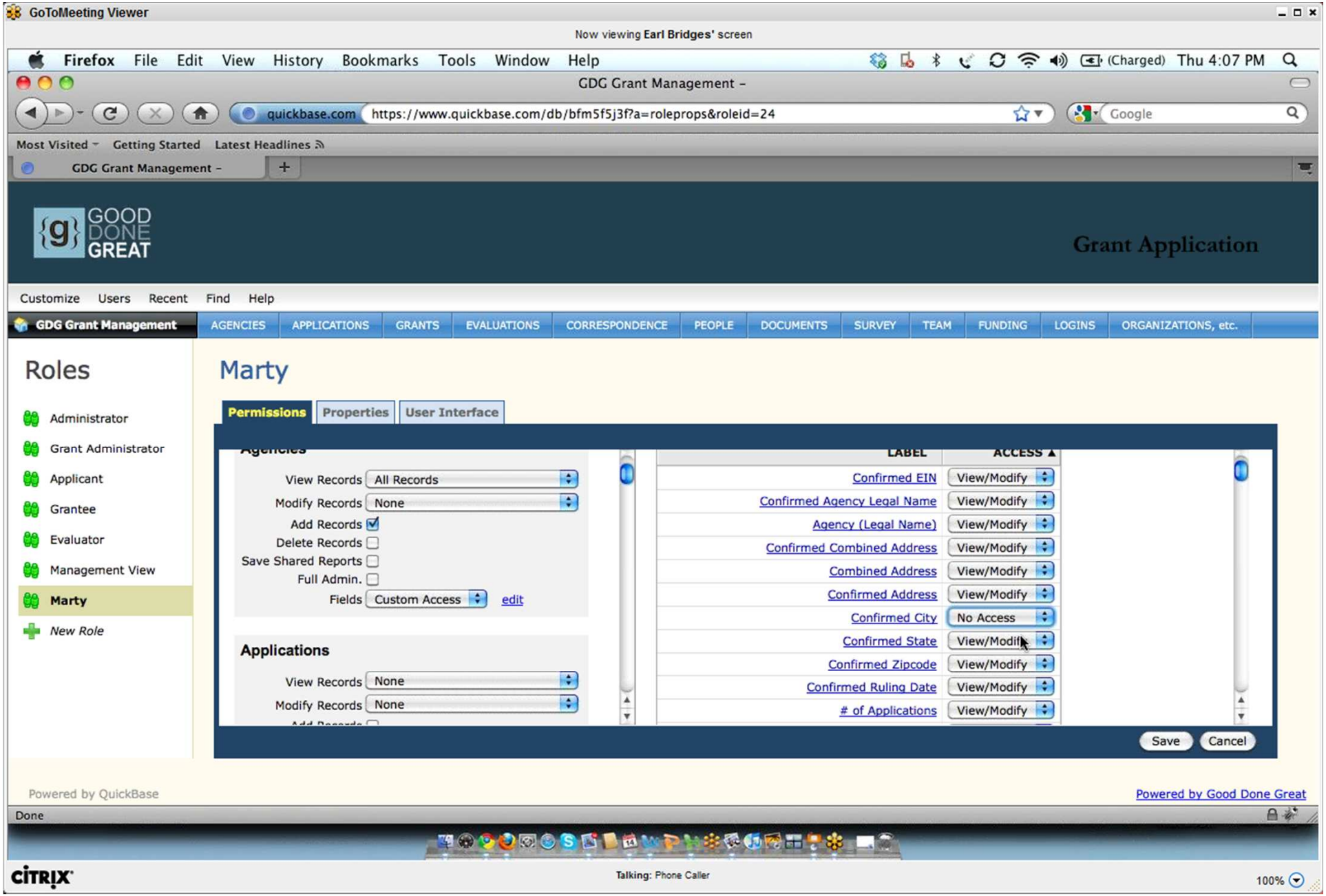
Auto-Sent E-mail After First Login



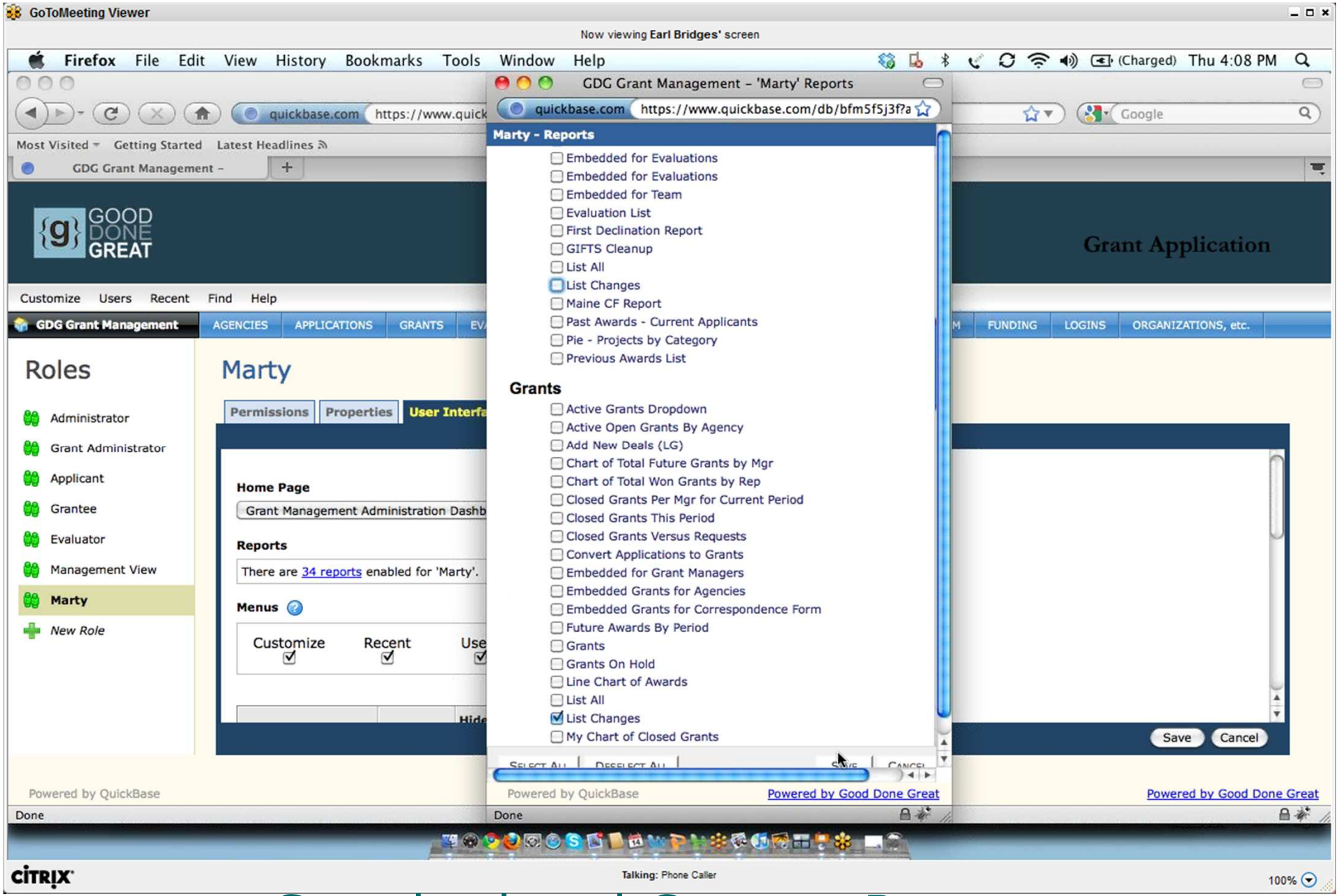
Built-in Grantmaker Provided Help for Each Application Field



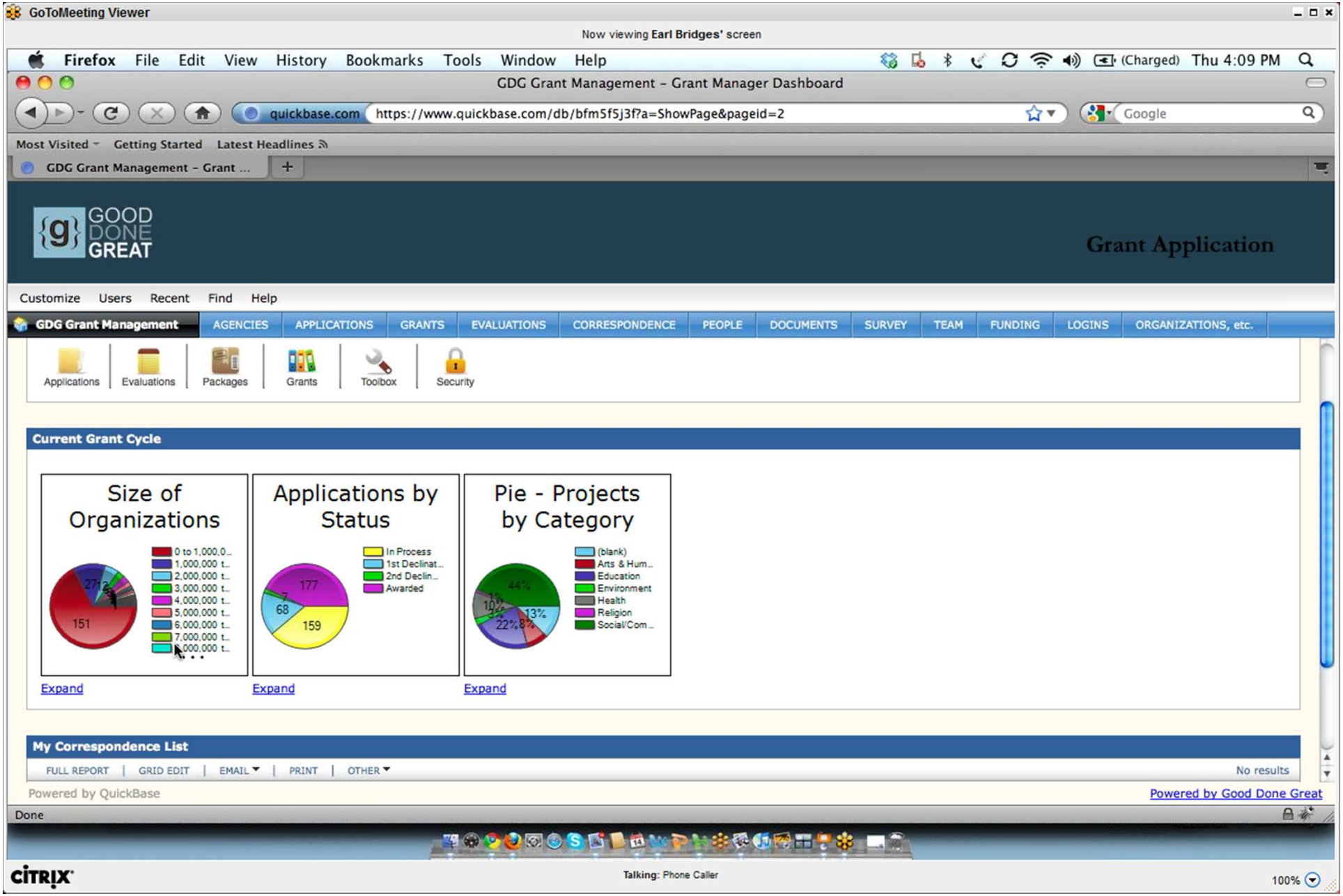
Grants Management Administration Dashboard



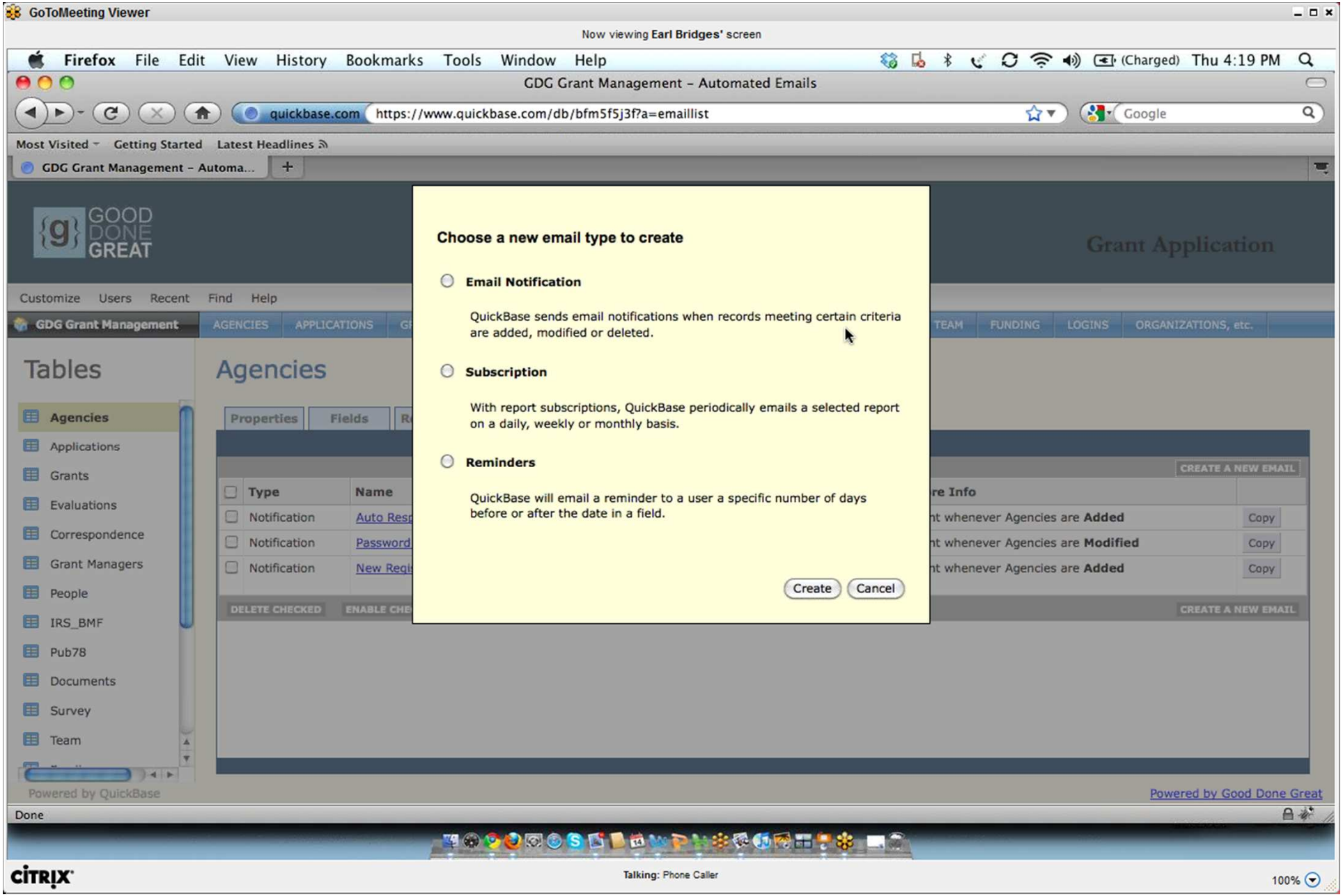
Detailed Access Rights by Group or User



Standard and Custom Reports by Group or User

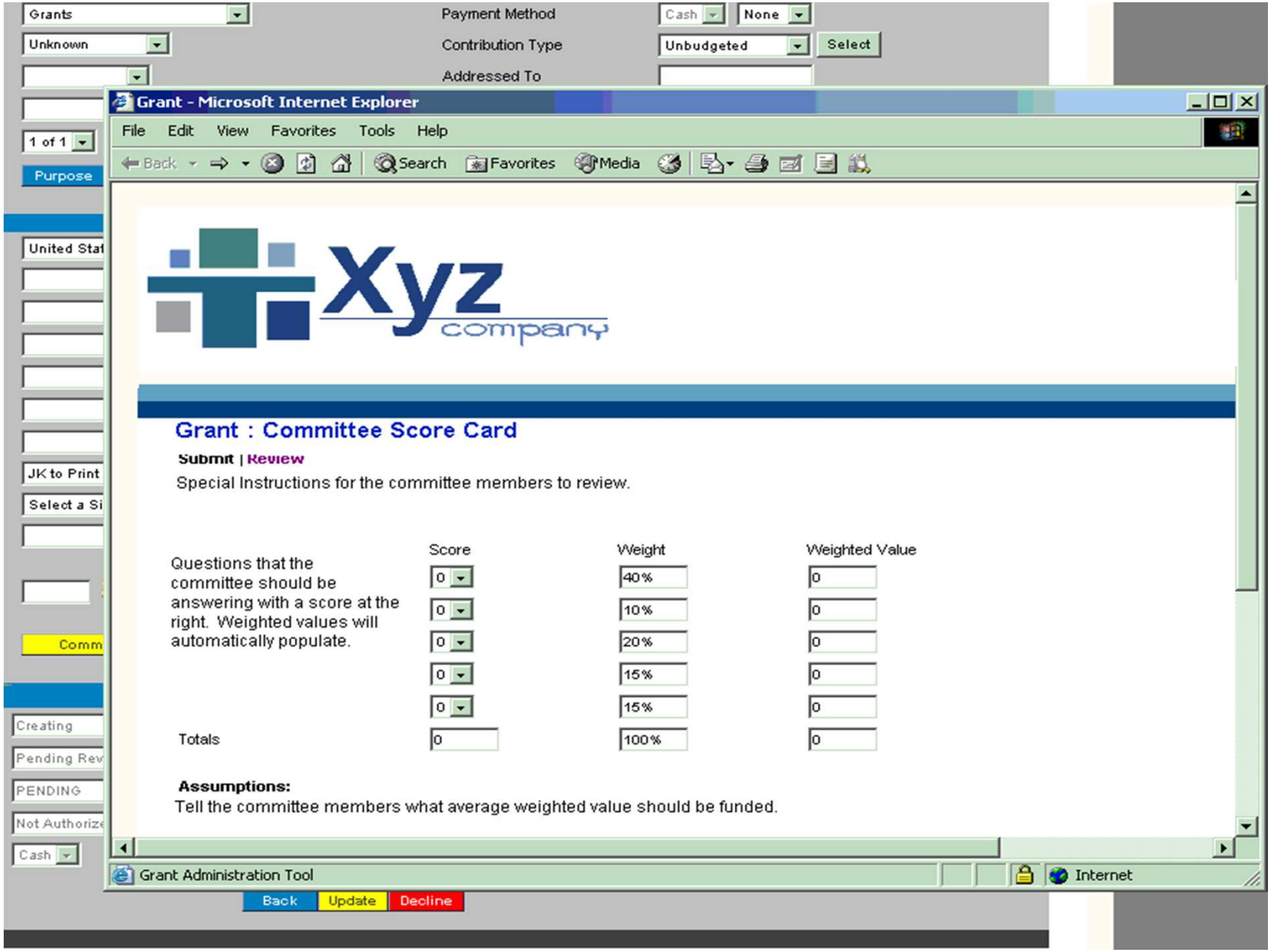


Built-in Graphics

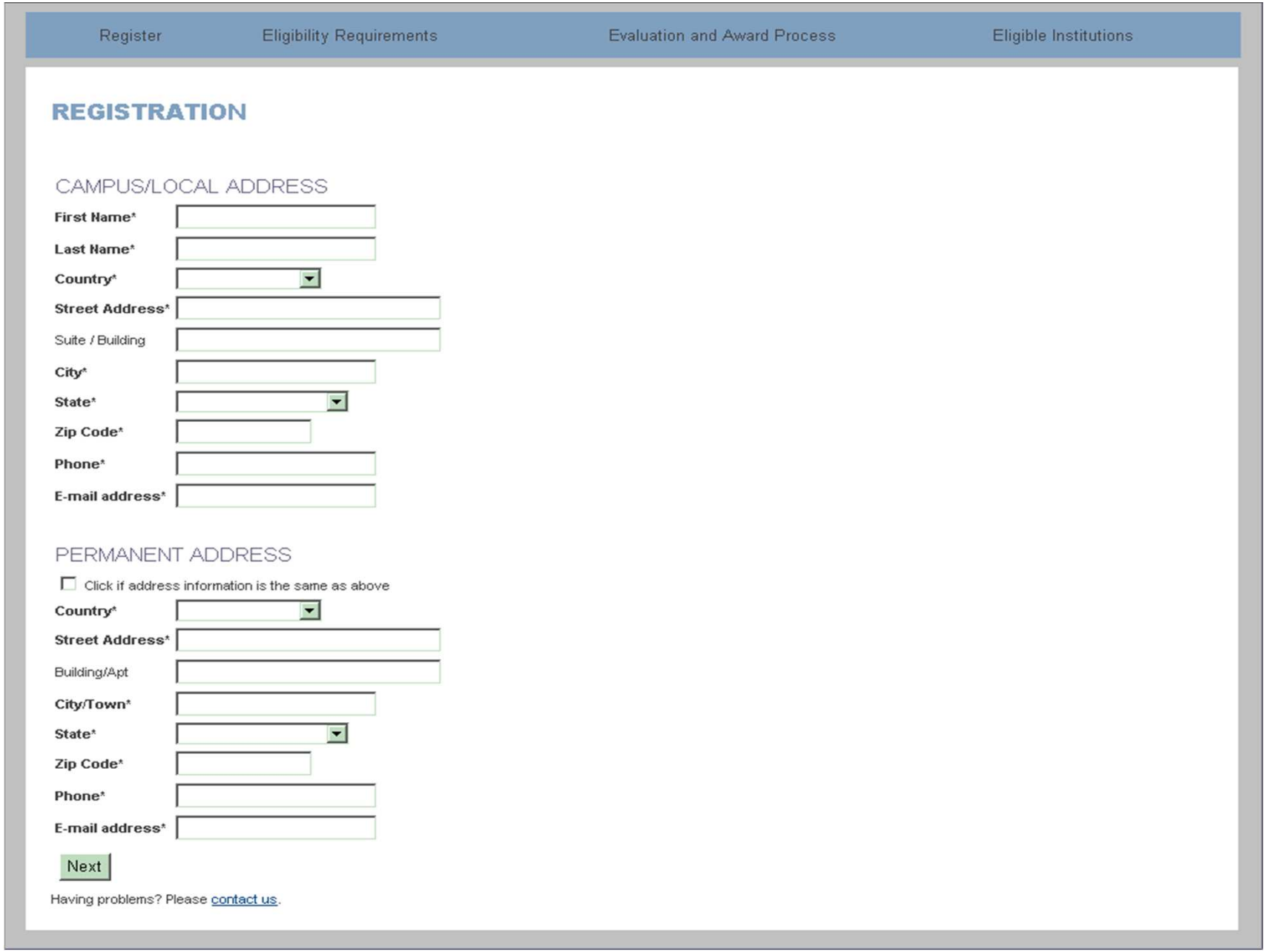


Auto E-mail Options

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



Committee Review

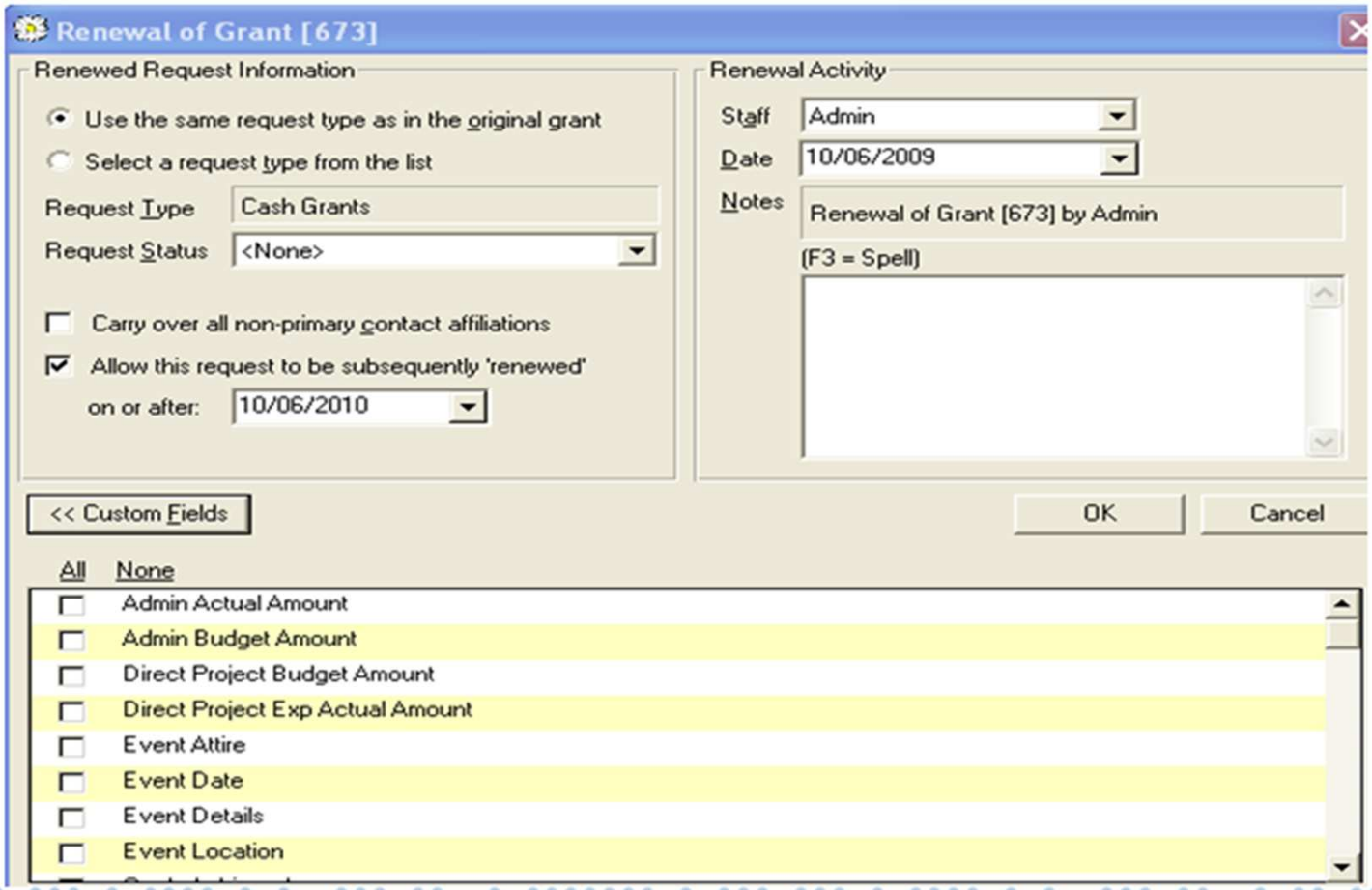


Scholarship Registration

Multilingual Web Pages

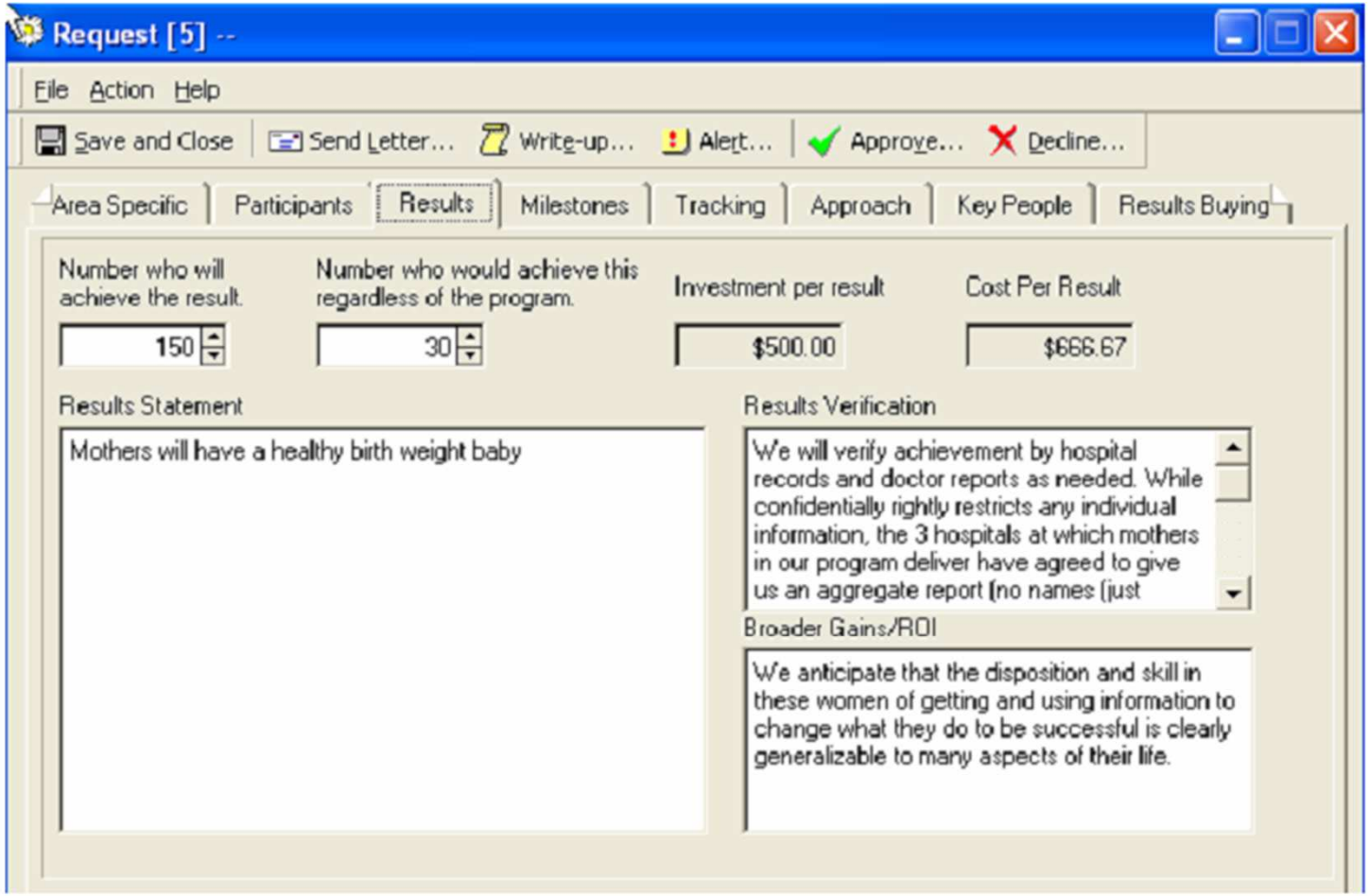
GIFTS 6
Essential GIFTS 6
GIFTS Optional Modules
Foundation Information Management Systems (FIMS)
FoundationPower™ (FP) Custom

- Customizer Fields available with Grant Renewals



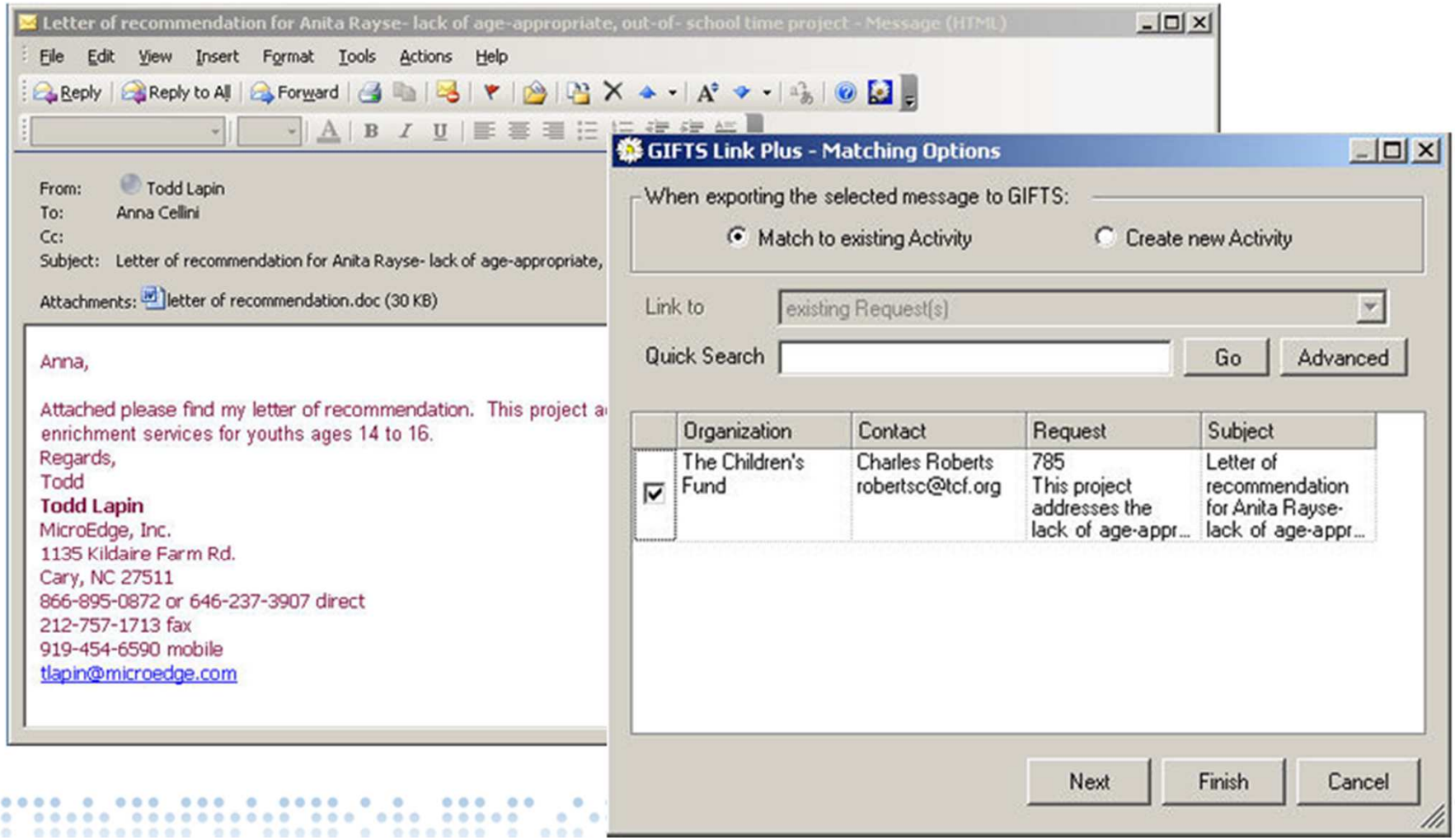
GIFTS Plus Pack 4.5 – Outcomes Plus

- Capture results to measure success



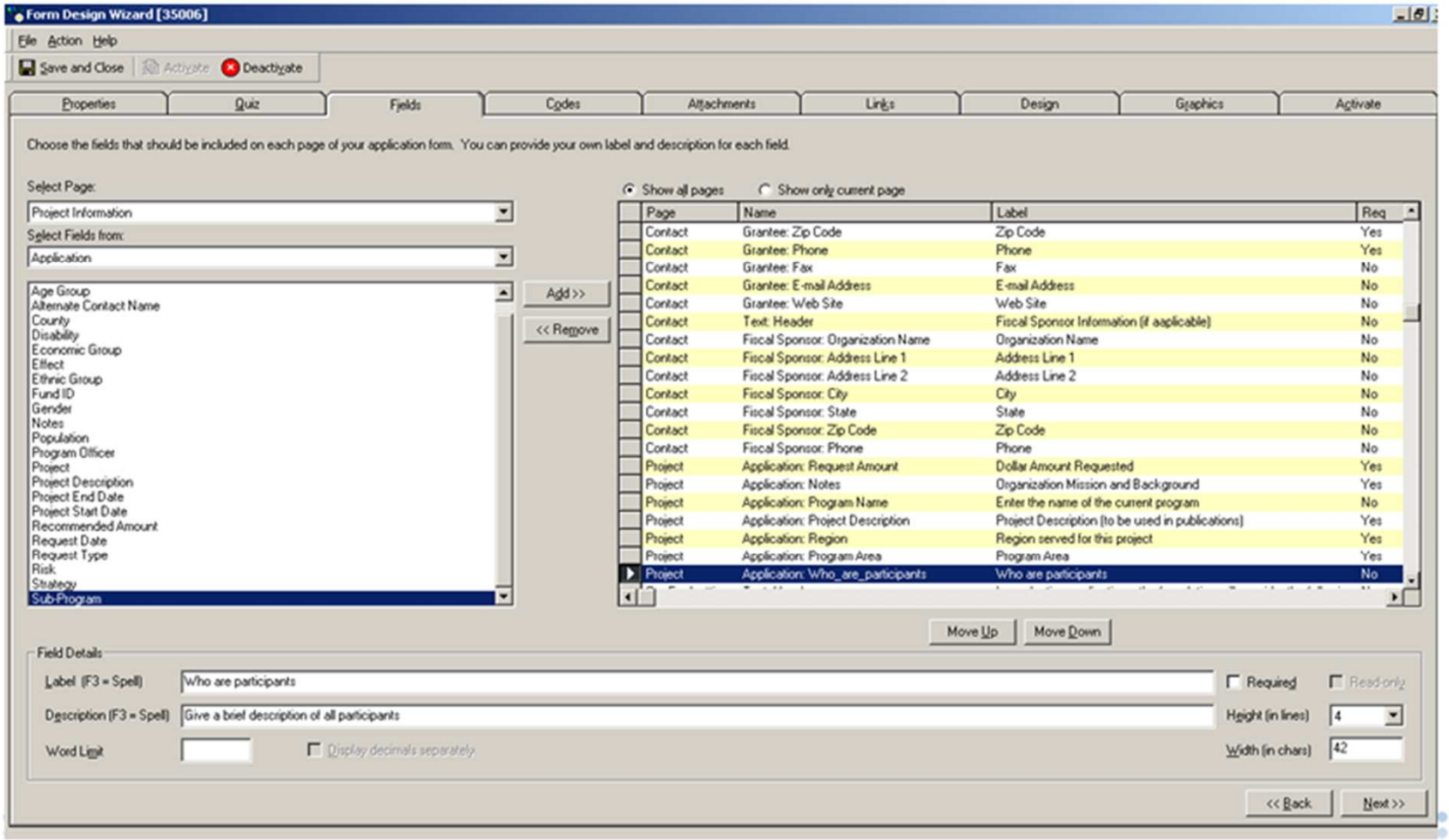
GIFTS Plus Pack 5 – Link Plus for use with Outlook®

Link email from Outlook to GIFTS



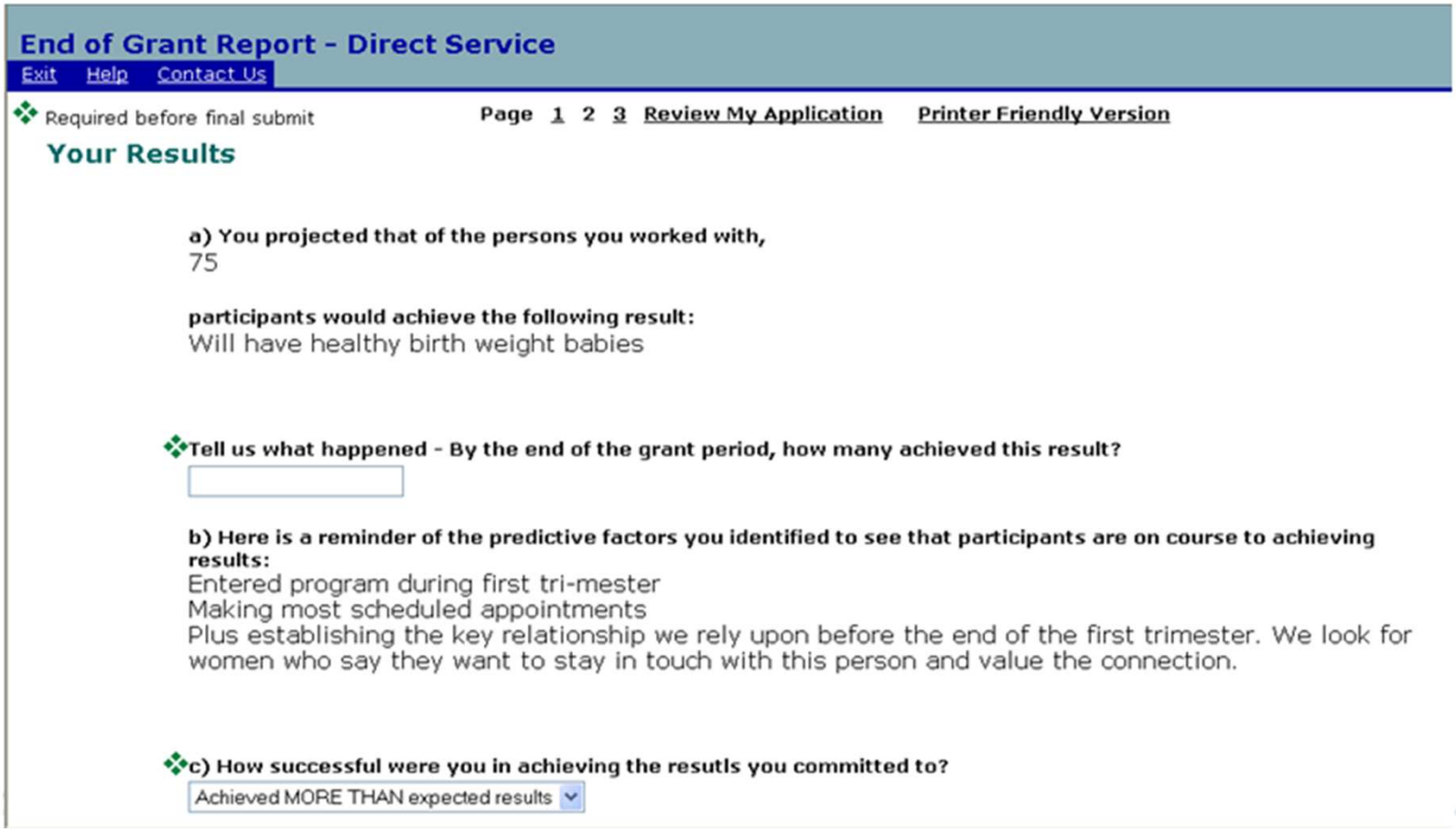
IGAM 3 for FIMS

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



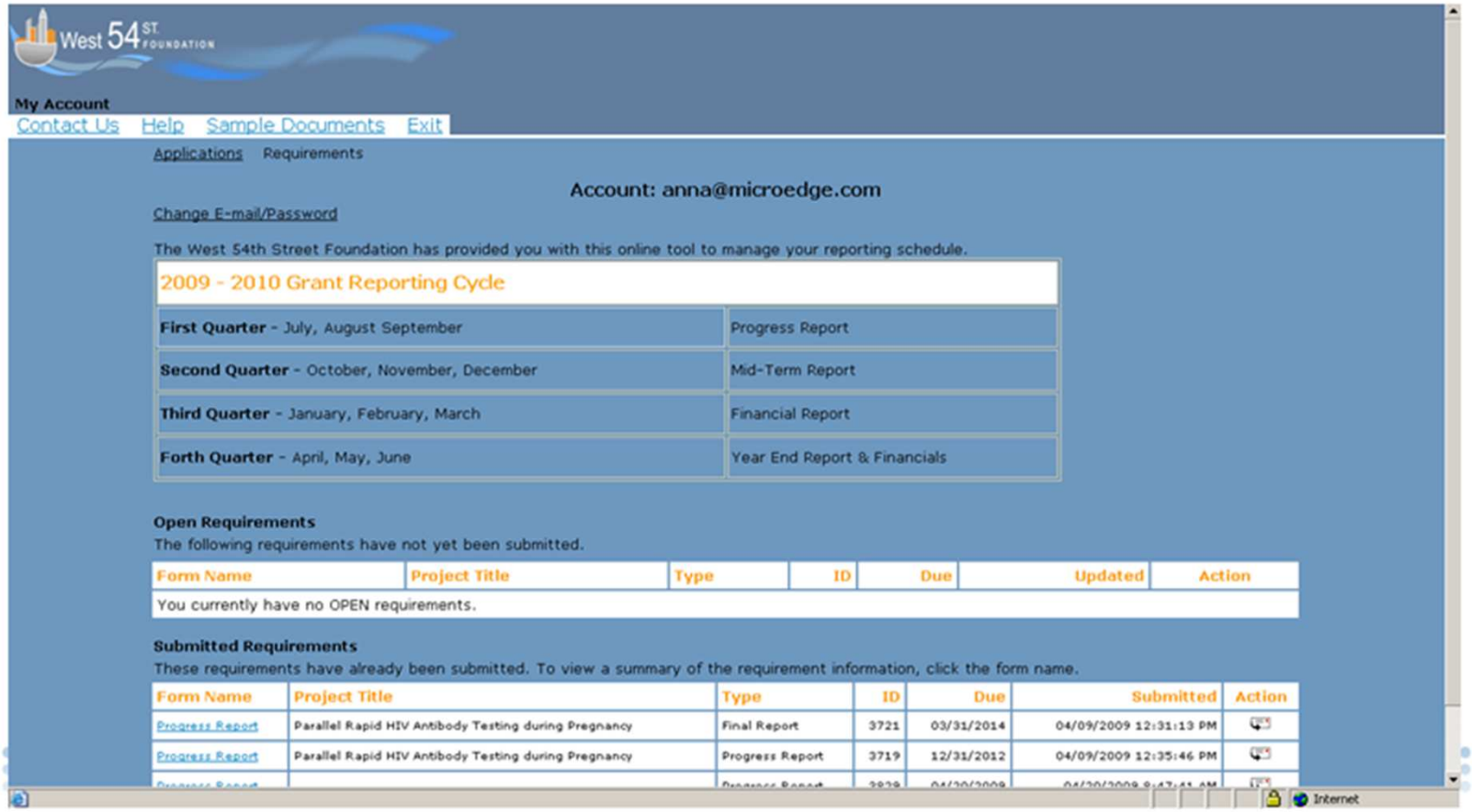
IGAM 4 for GIFTS

- Requirements Forms
  - : Publish online forms for requirements
  - : Seamlessly collect progress and final reports

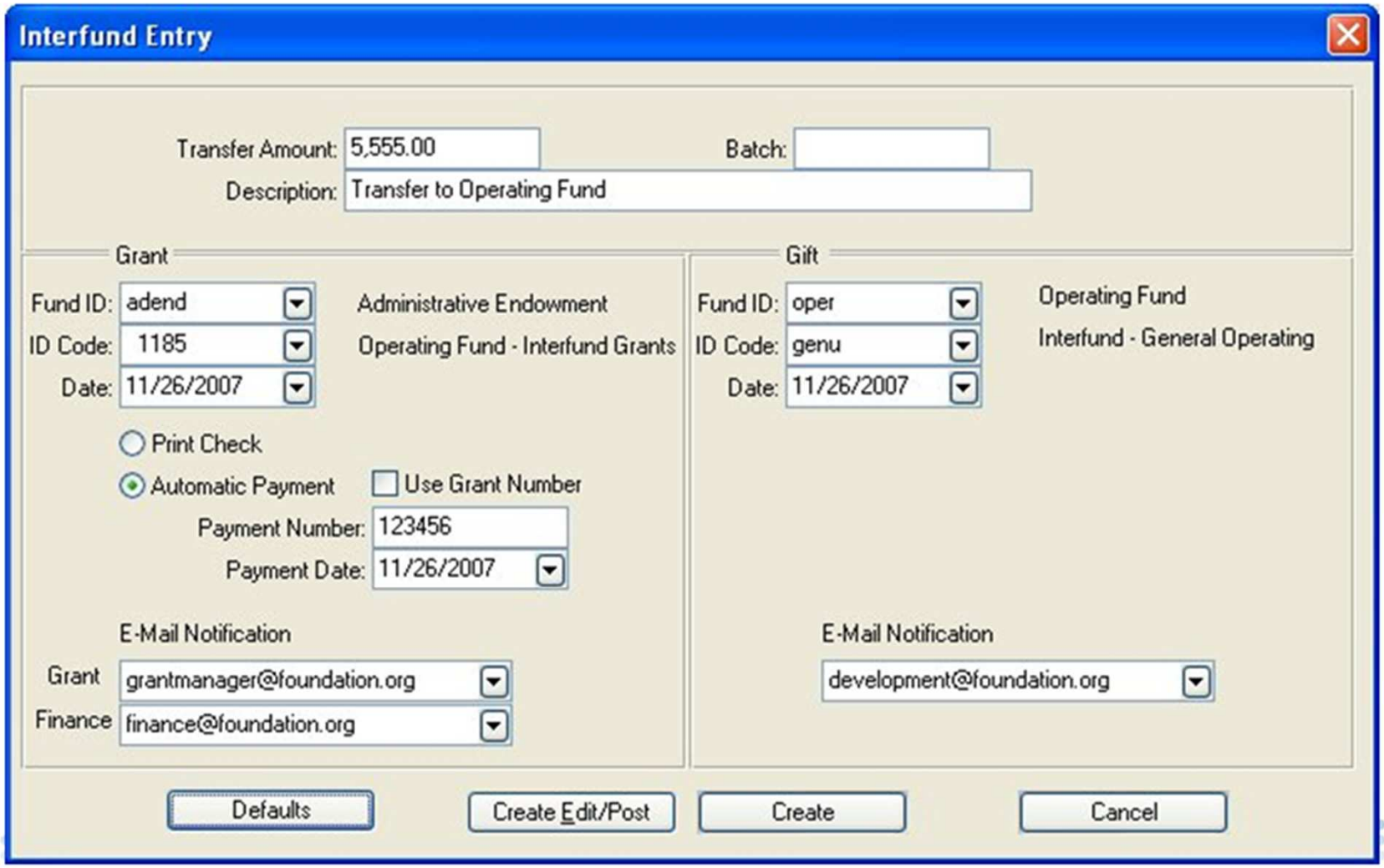


IGAM 4 for GIFTS

- 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

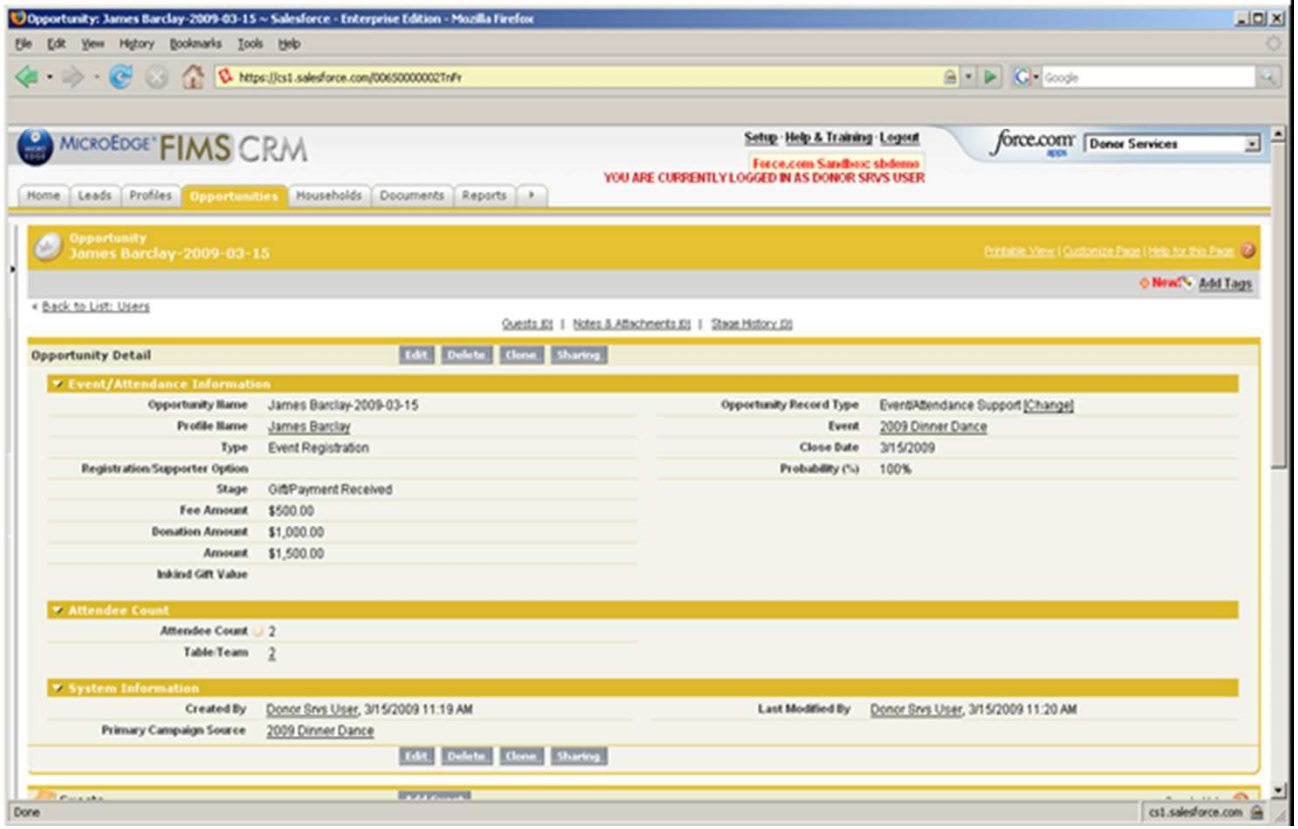


- Interfund quick entry



MicroEdge FIMS CRM

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

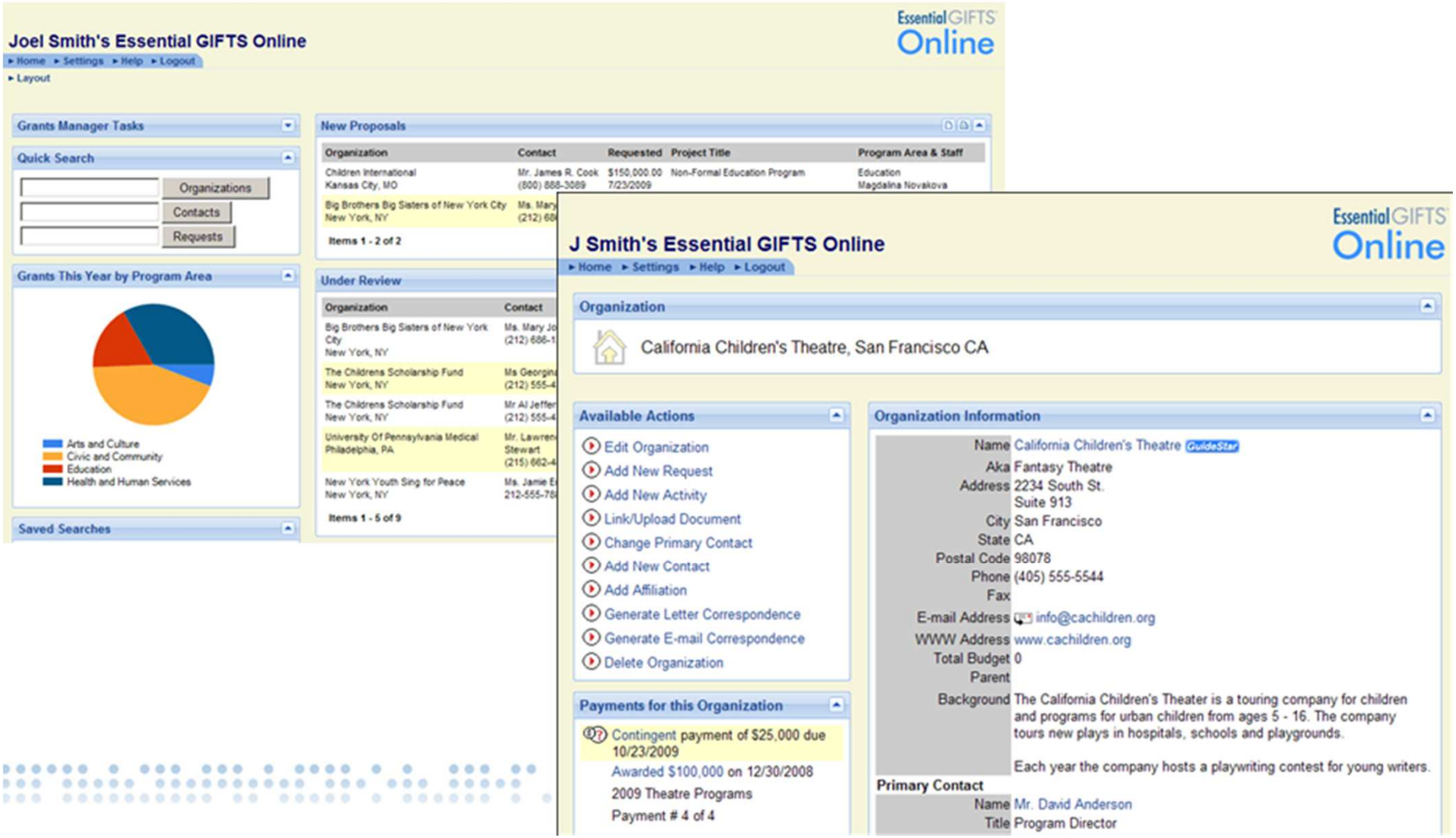


Essential GIFTS Online / GIFTS Online
(Currently in limited release – rollout targeted in 2010)

- 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

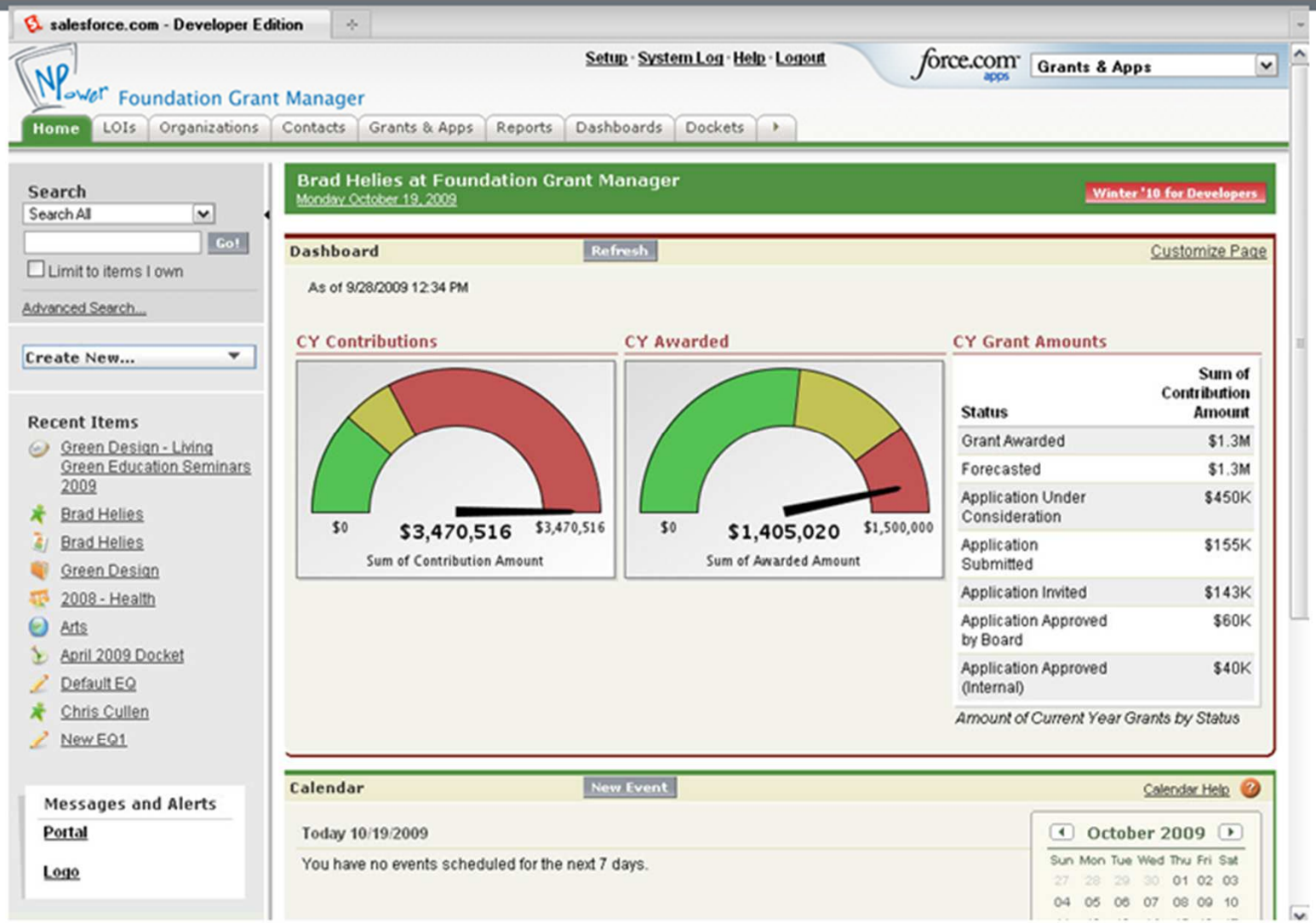


Foundation Grant Manager

Foundation Grant Manager Community Edition

Foundation Grant Manager

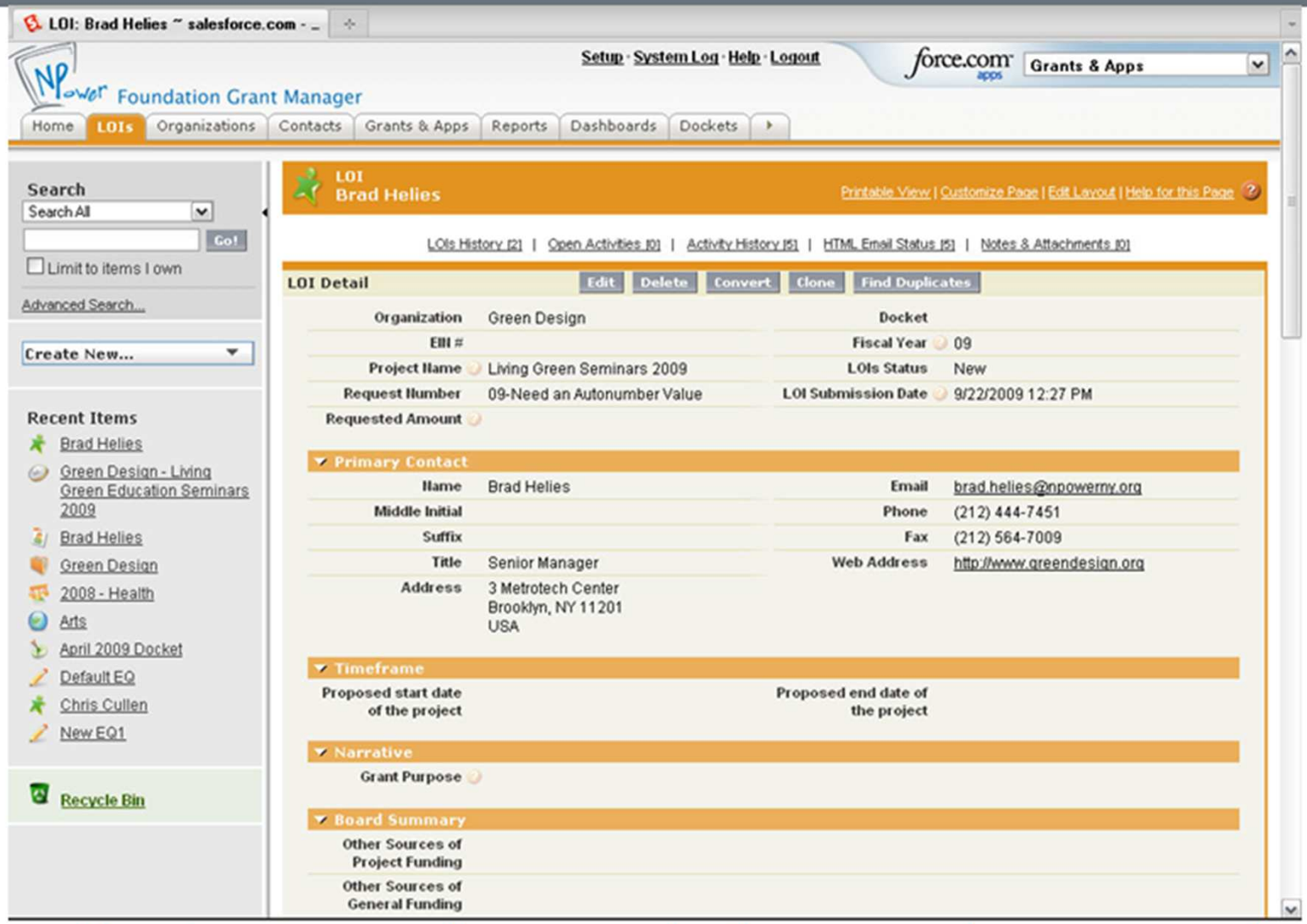
Home Page



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

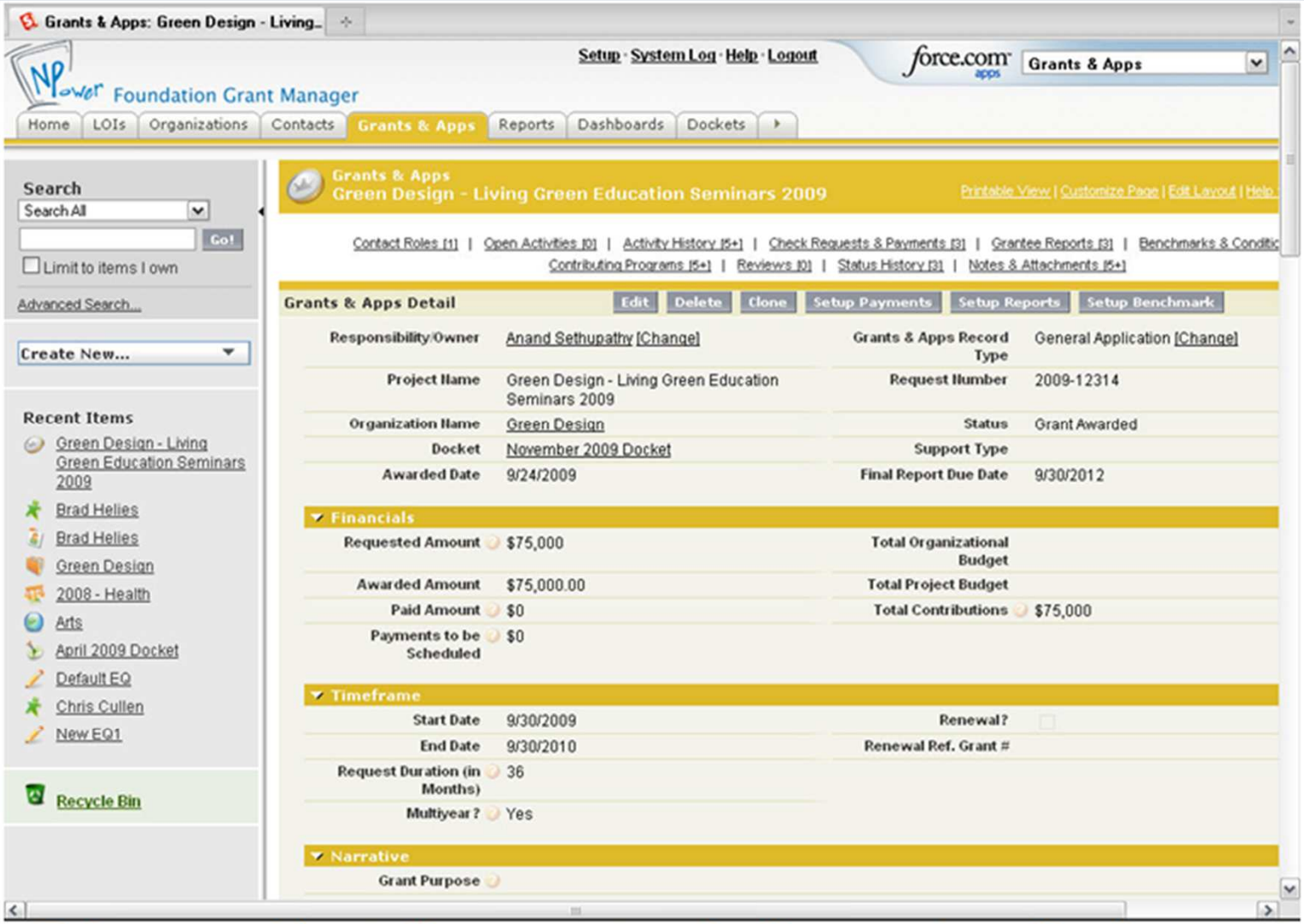
Letter of Inquiry



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

Foundation Grant Manager

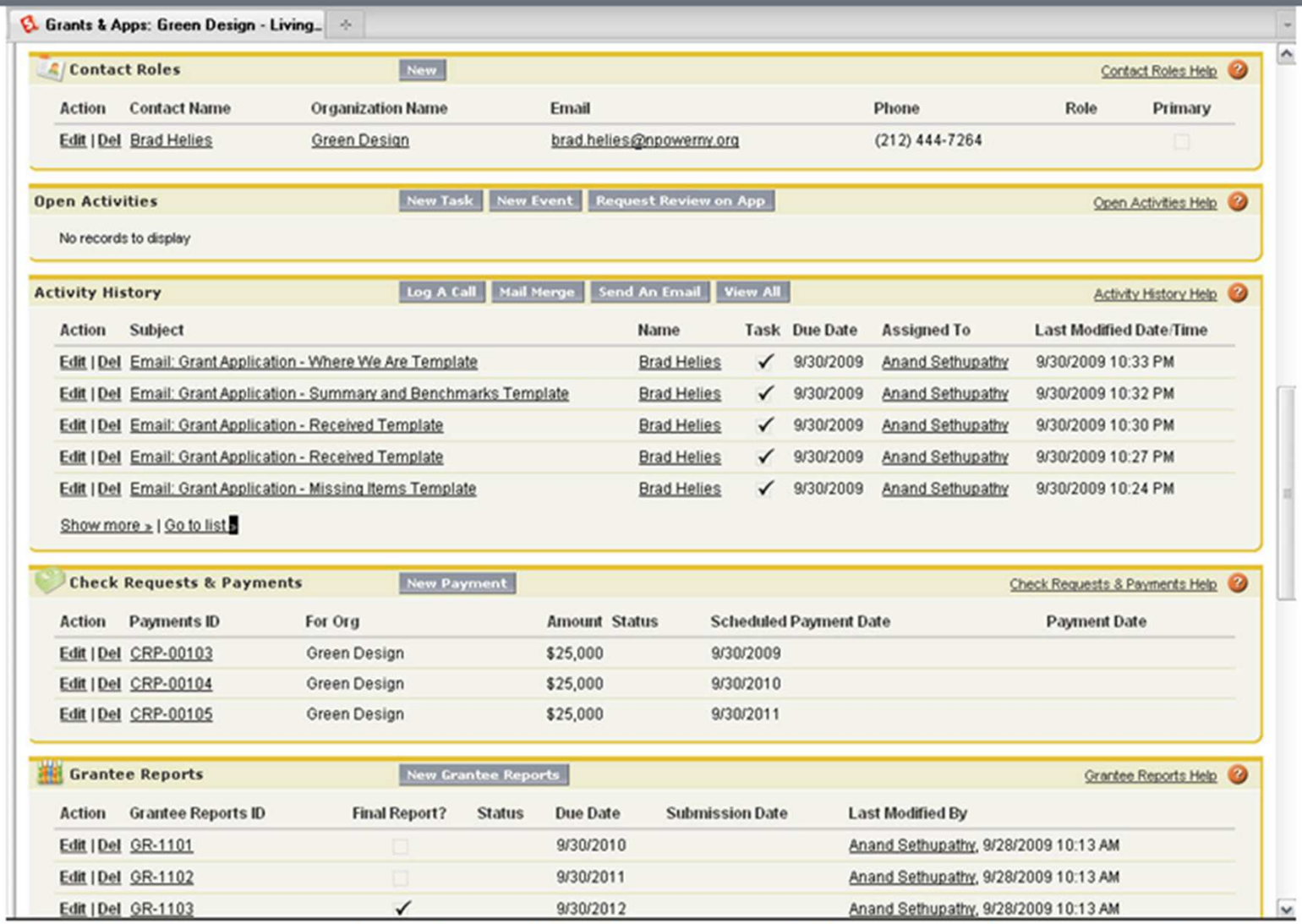
Grants & Apps



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

Foundation Grant Manager

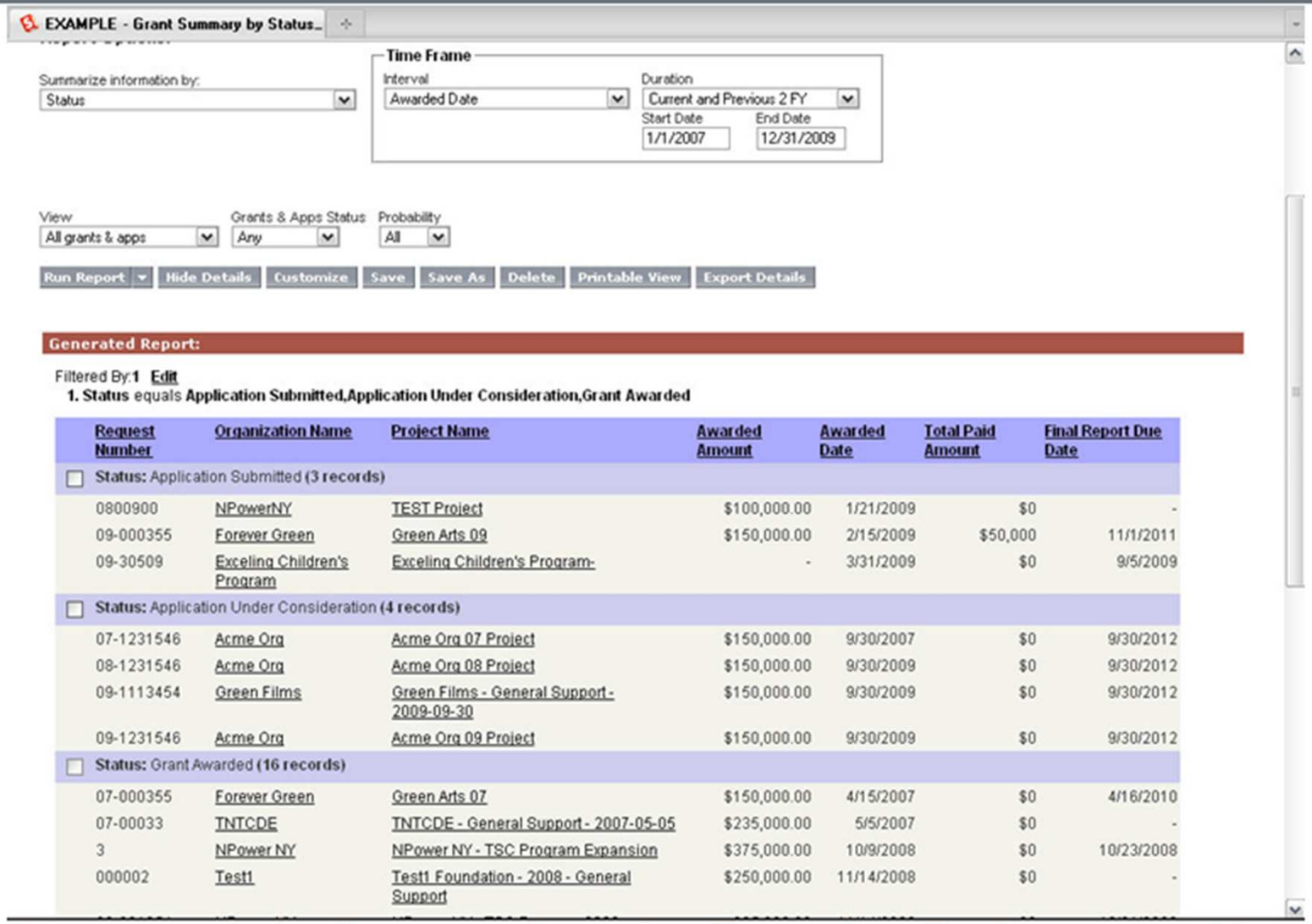
Related Lists



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

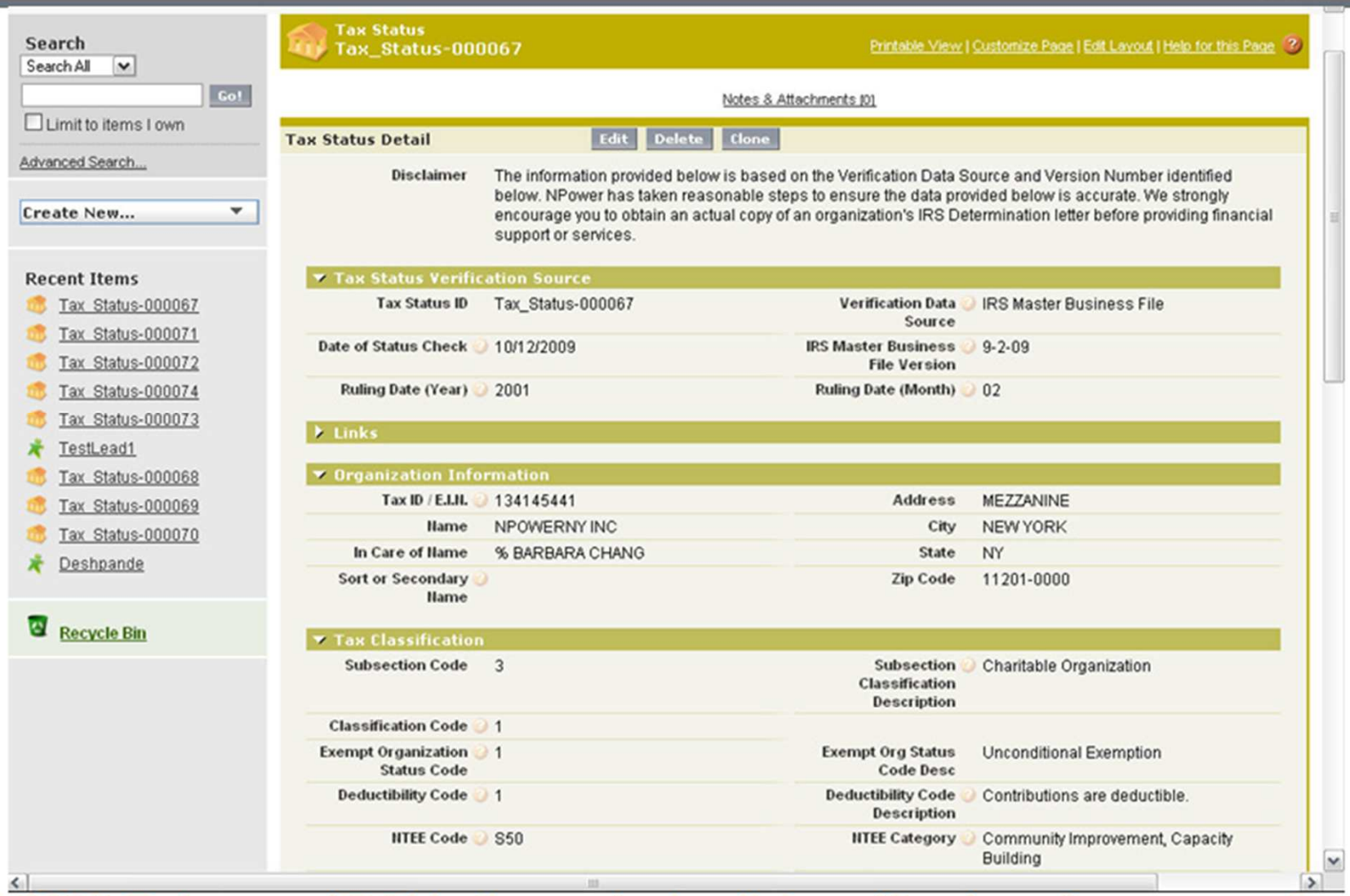


Request Number	Organization Name	Project Name	Awarded Amount	Awarded Date	Total Paid Amount	Final Report Due Date
Status: Application Submitted **(3 records)**						
0800900	NPowerNY	TEST Project	$100,000.00	1/21/2009	$0	-
09-000355	Forever Green	Green Arts 09	$150,000.00	2/15/2009	$50,000	11/1/2011
09-30509	Exceling Children's Program	Exceling Children's Program-	-	3/31/2009	$0	9/5/2009
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
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.

Foundation Grant Manager

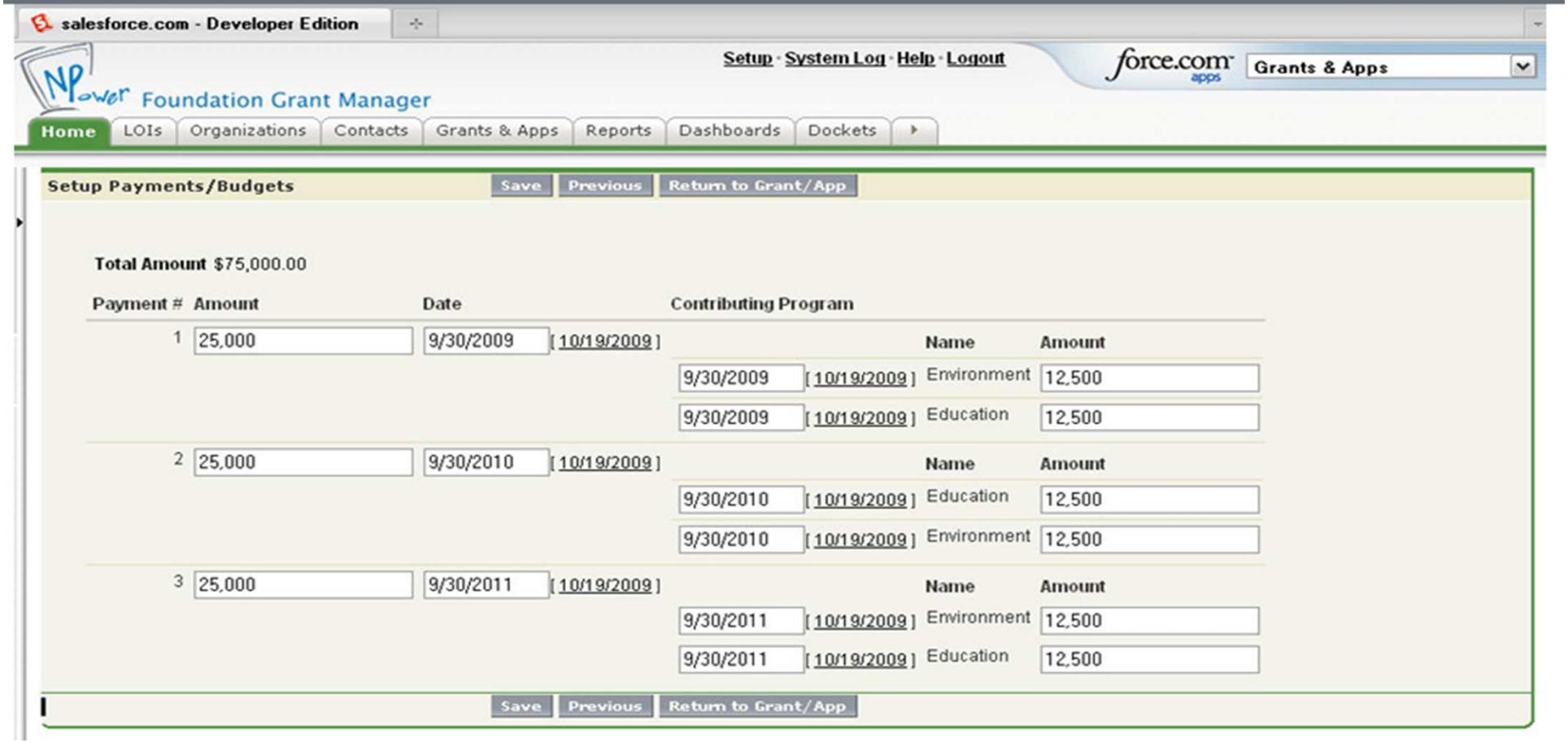
Q4 2009 Release : 501(c)(3) Verification



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

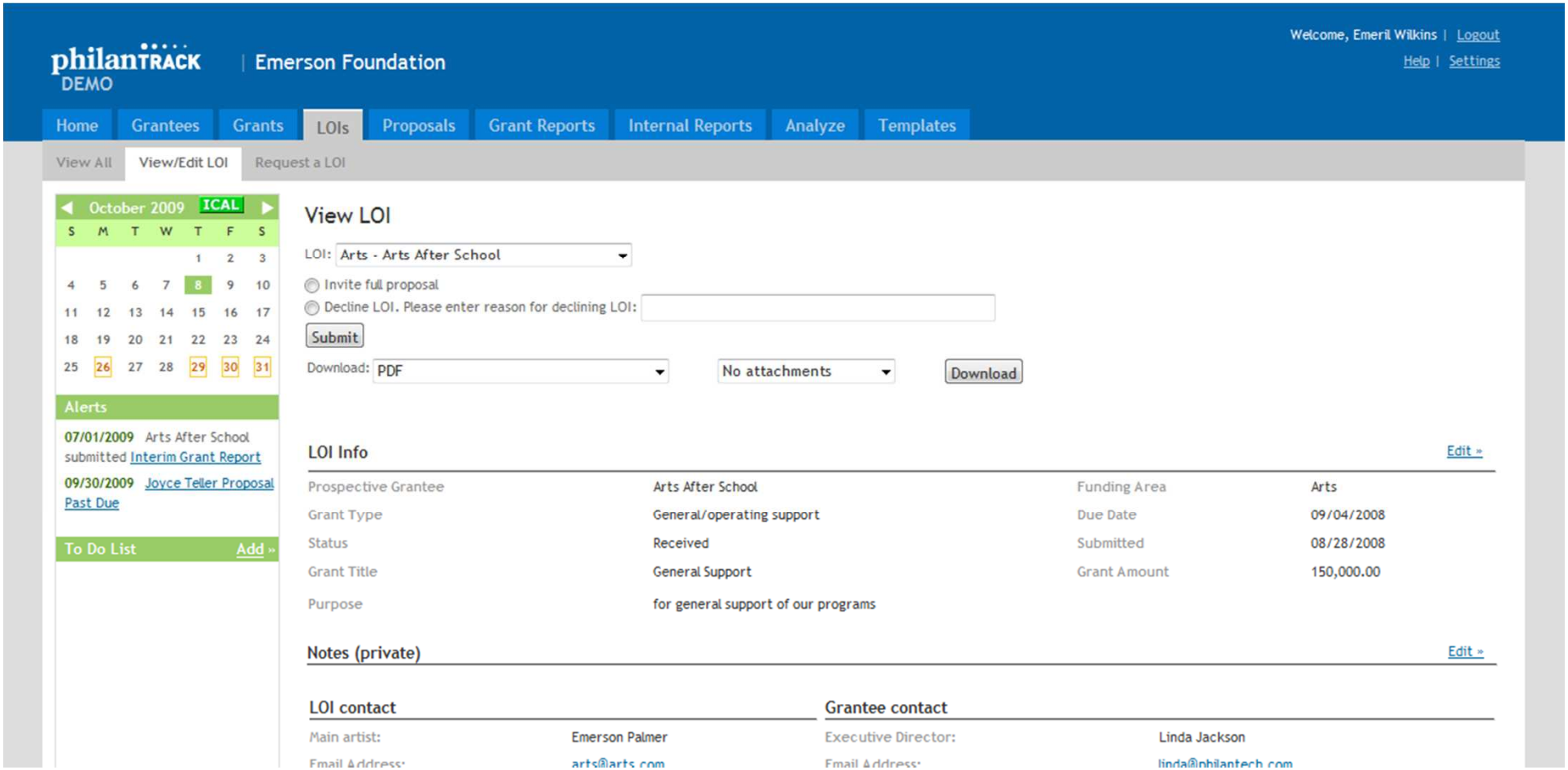
Foundation Grant Manager

Q4 2009 Release : Setup Wizards

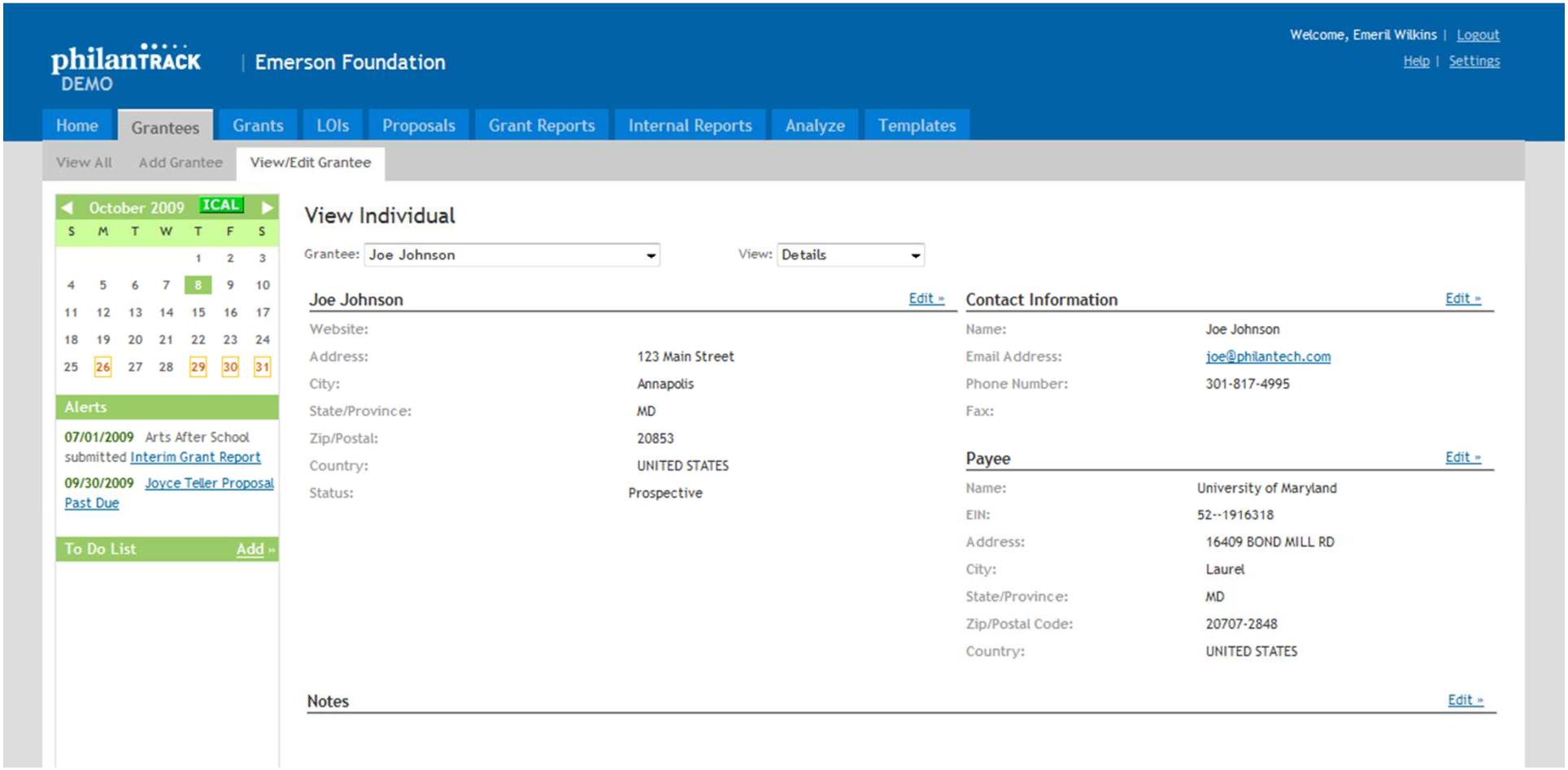


Q4 2009 Release of FGM provides Setup Wizards that allow users to quickly and efficiently set up payments, grantee reports and associated objectives for awarded grants. Scheduling payments that draw from multiple founding sources for your organization, and associating grant objectives and scheduled report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

PhilanTrack™ Online Grants Management System



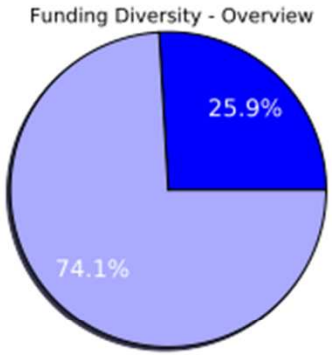
Support for Multi-stage Application Process (e.g., Letter of Inquiry to full proposal)



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

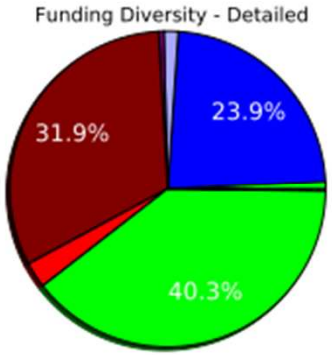
Support for Fiscal Sponsors / Payees other than Grant Recipient



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%



Enlarge and view details

Export to Spreadsheet

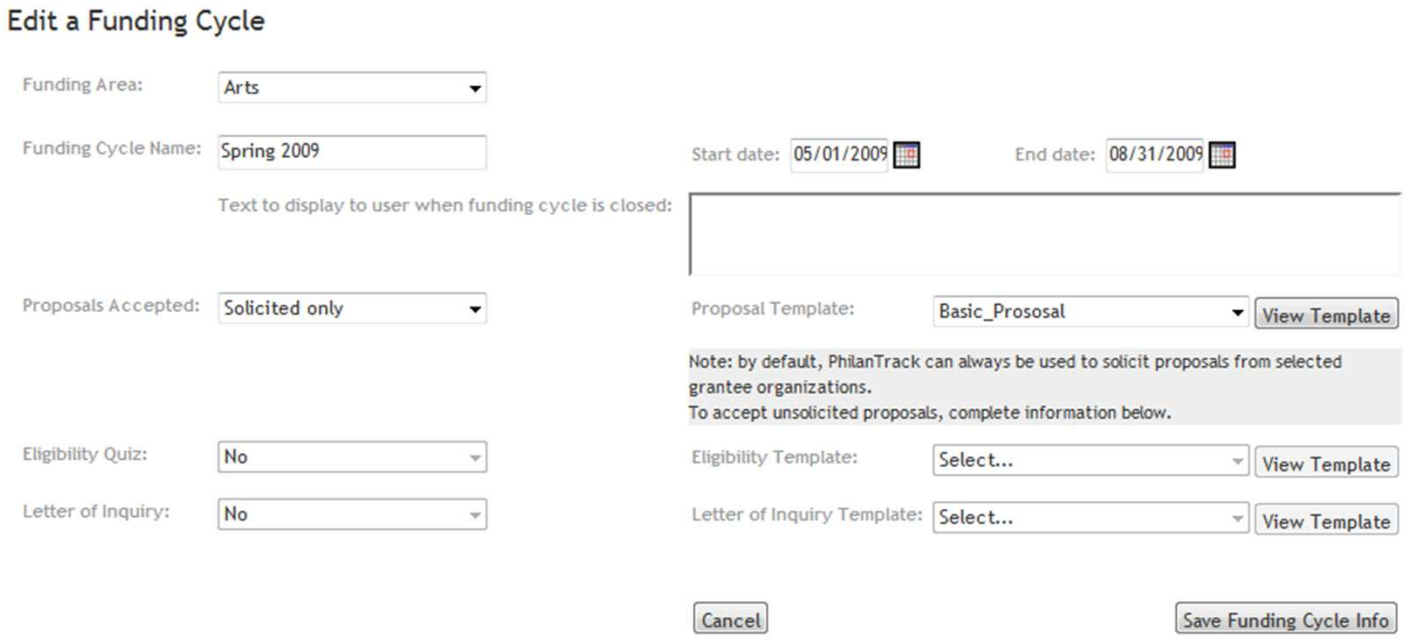
Source	Amount	Pct
Individual Contributions	1,089,134.00	23.9%
In-Kind Contributions/Donations	67,082.00	1.5%
Special Events Revenue	23,855.00	0.5%
Rental Income	1,454,509.00	31.9%
Dividend and Interest Income	120,428.00	2.6%
Realized Gain/(Loss) on Investments	1,834,113.00	40.3%
Gain/(Loss) on Sale of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

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

Grant Documents

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

Enhanced Document Management for Awarded Grants

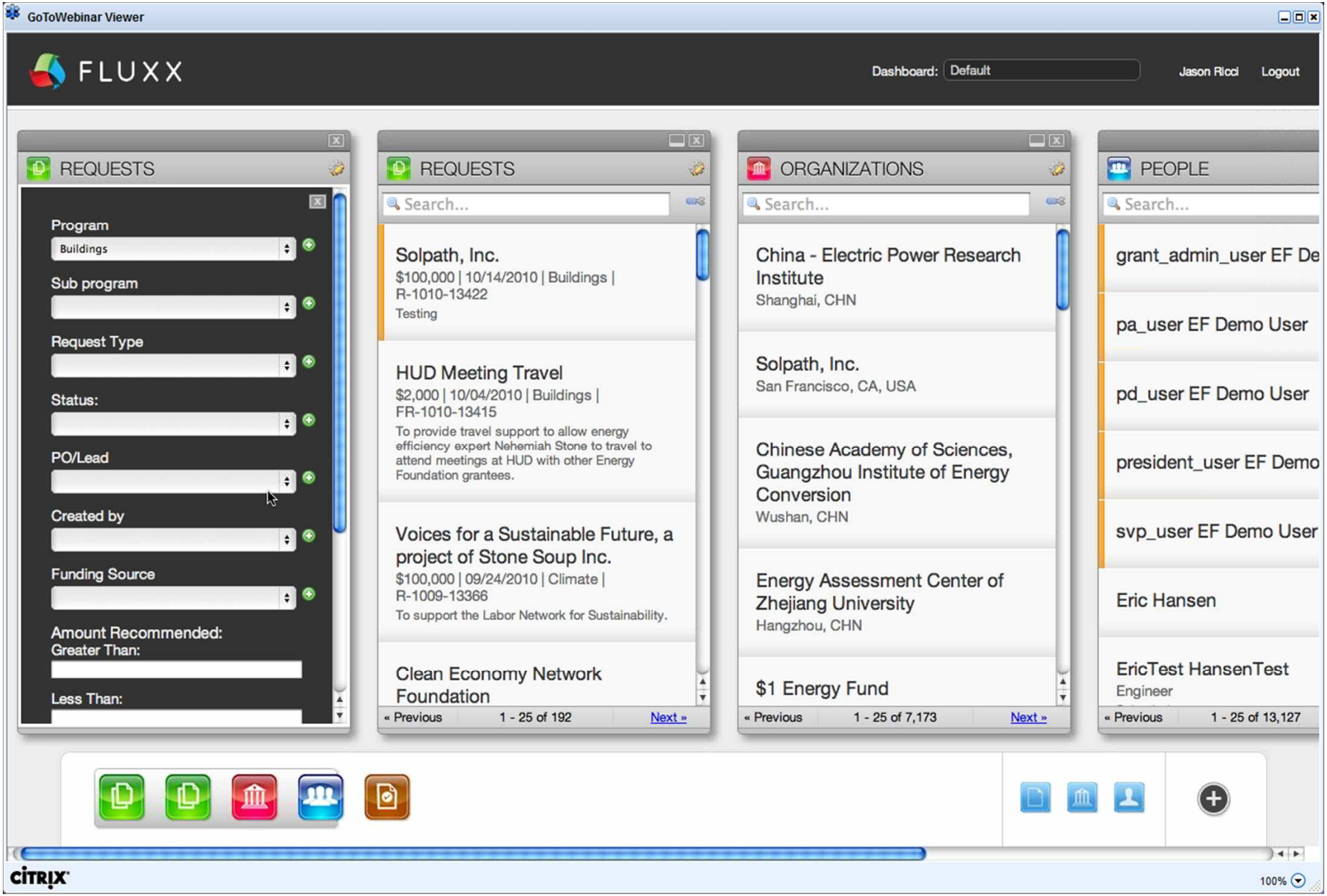


Enhanced Funding Cycle Management
(e.g., automatically closing a funding cycle to new applicants when deadline is reached; automatically opening for next round)

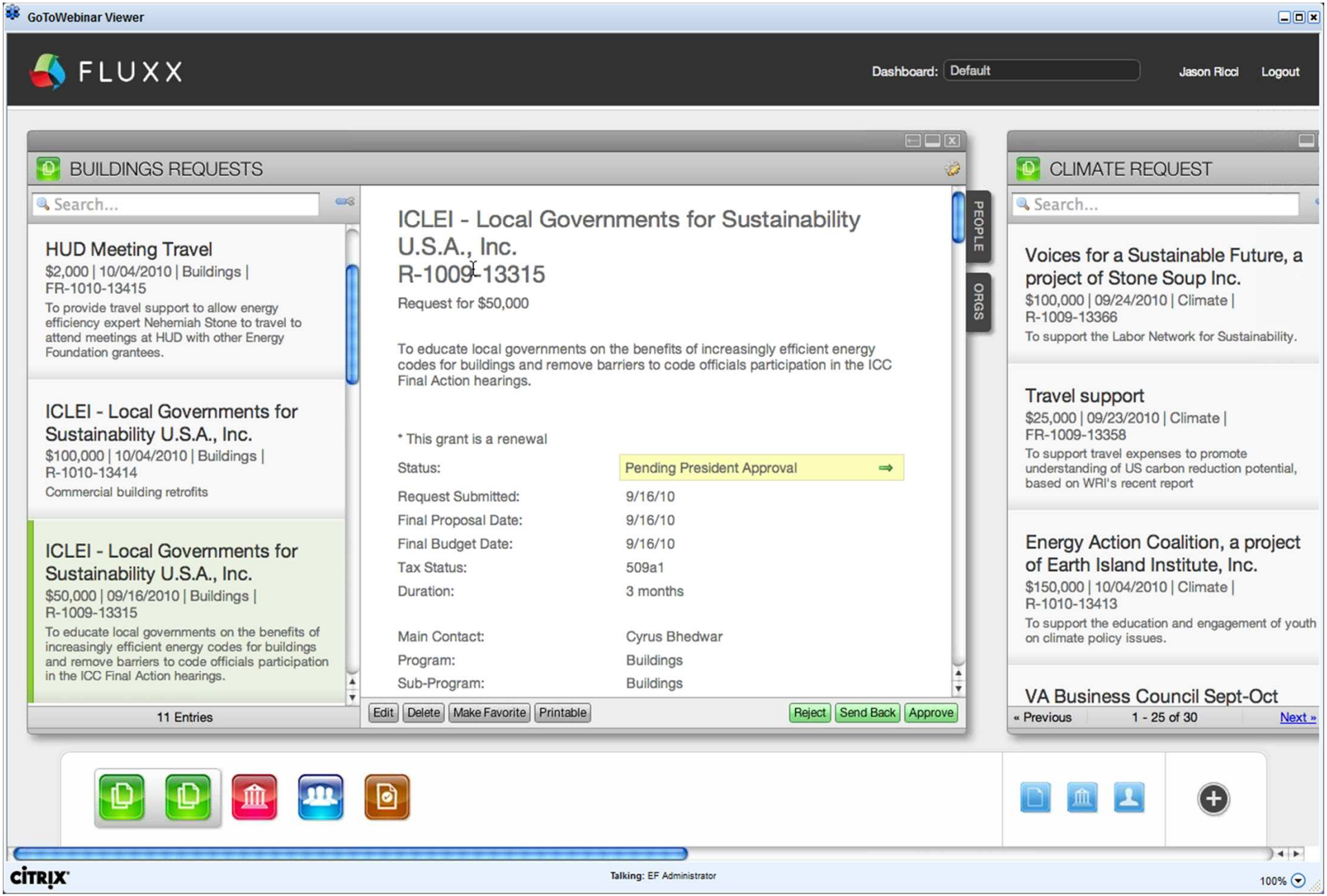
solpath

FLUXX

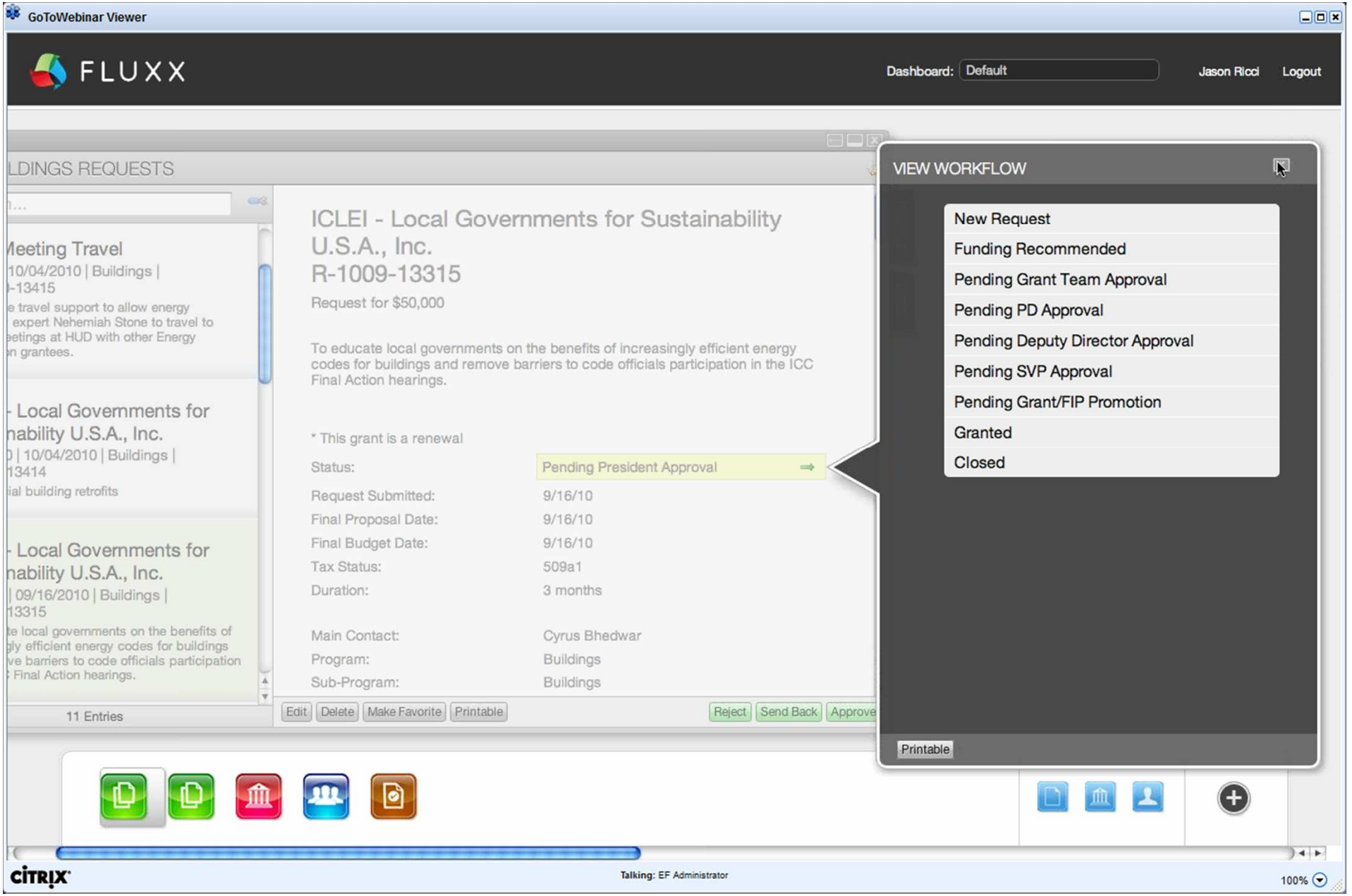
The Open Source Grants Management Platform



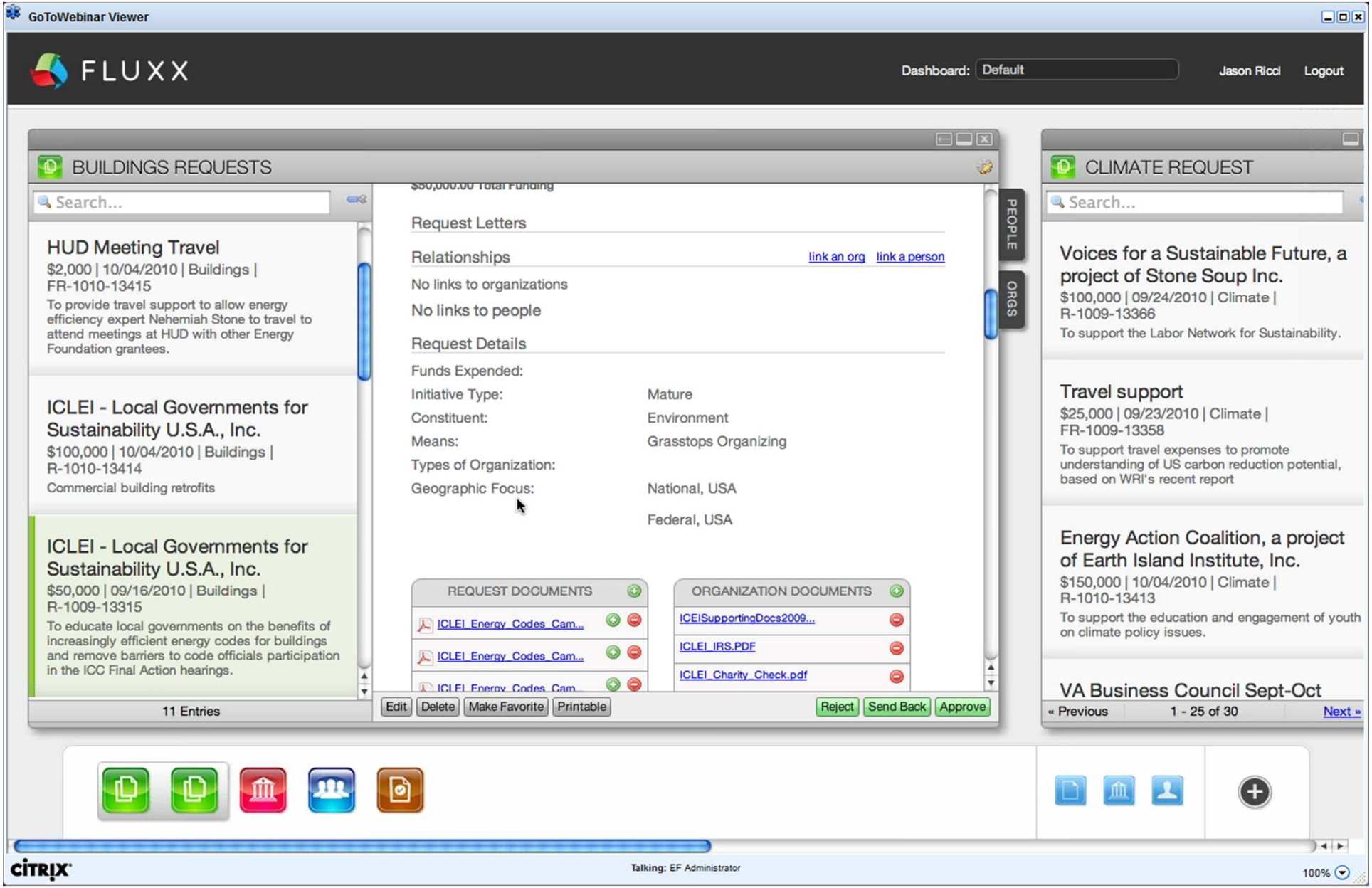
Basic Screen with Search Request



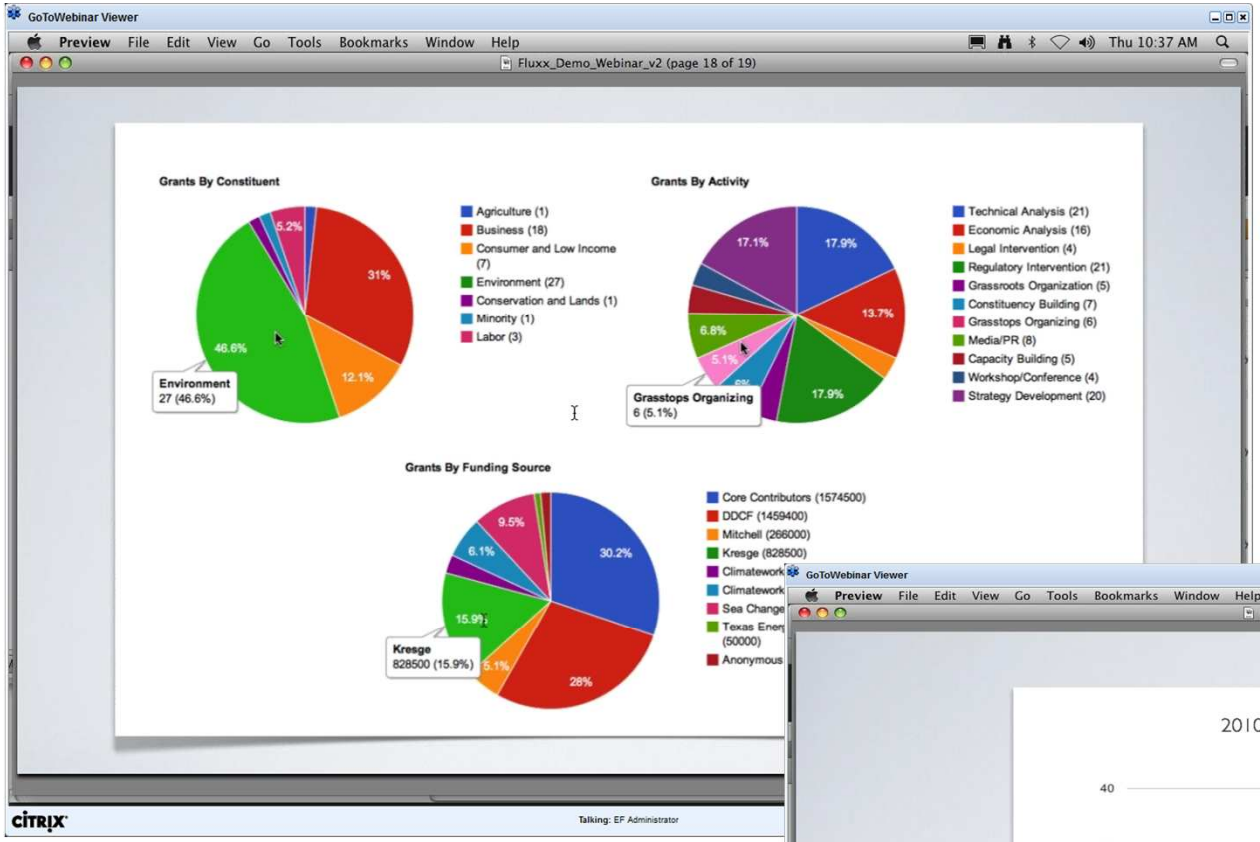
Grant Detail Screen with Tabs

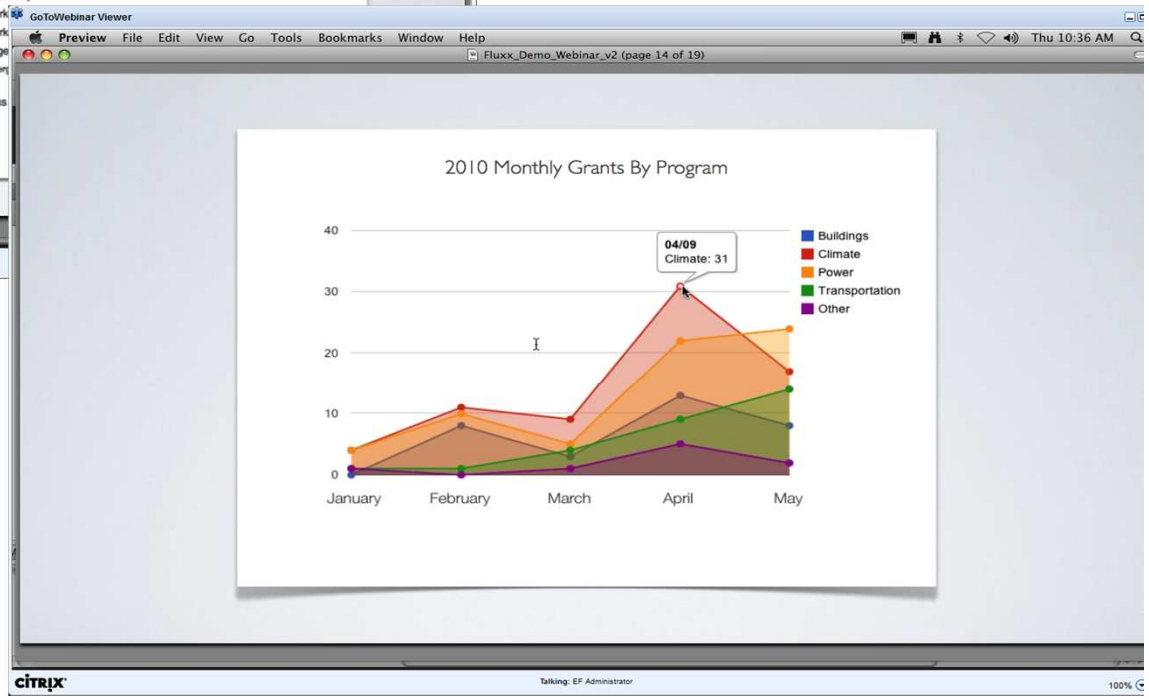


Workflow Options

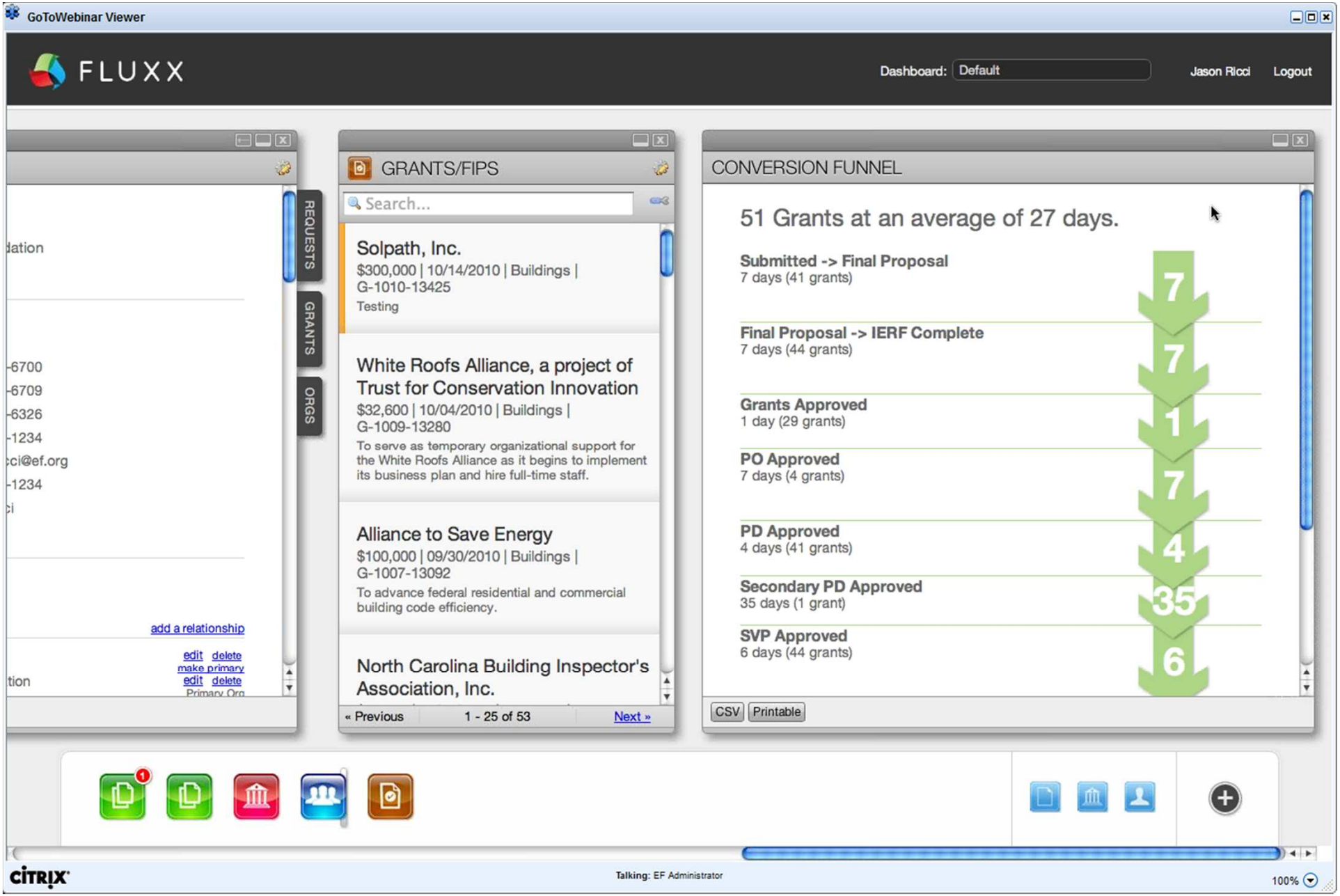


Attached Documents





Graphical Presentation of Data



Lapse Time Reporting

Solpath Fluxx Announced Roadmap as of October 2010

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

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

http://www.iaa.com