

Emerging Technology Trends and Grants Management Software / Services

AGM Corporate Philanthropy Conference:
Smart - Simple – Strategic
March 30, 2007

Martin Schneiderman
Information Age Associates
47 Murray Place
Princeton, NJ 08540 USA
mbs@iaa.com
www.iaa.com
609-924-6936



Emerging Technologies and Their Impact on Foundation Systems



New Technologies that Will Impact Foundation Information Systems

i Newly released products

- l Microsoft Office 2007 – new user interface, greater interoperability between Office applications, new XML file format, tighter integration with SharePoint
- l Windows Vista – with enhanced security and a new user interface
200 million preloaded copies predicted to ship in the first 24 months following release
- l Microsoft SharePoint workgroup portal software - the centerpiece of Microsoft's new Office application strategy



New Technologies that Will Impact Foundation Information Systems

- i More and faster broadband access (DSL, cable modem, satellite, fiber optic), cellular, Wi-Fi and VoIP communications resulting in increased demand for remote access to office information systems.
- i Potential for greater system integration using Microsoft .NET and Web Services as the next generation architecture for many vendors of commercial systems
- i Improved development tools that enable more rapid development plus greater modularity and interoperability



Major Grants Management Systems and Services

Costs can range from US \$5k-250k+ depending on modules, number of users, transactions, investments, professional services, etc.

- i Altum
- i Bromelkamp Company
- i CyberGrants
- i Foundation Source
- i MicroEdge/NPO Solutions



Major Commercial Grant Management System Vendors and their Products

Company	Major Products and Services • = Announced for availability in 2007
Altum	Easygrants, Alum Post-Award Grants Management Suite, Query Module, Infor MPC Budget & Performance Management
Bromelkamp Company	First Pearl, Pearl, Community Pearl, Corporate Pearl, Pearl Loan Servicing, and Pearl companion modules • Akoya.net – Web-based grants management
CyberGrants	CyberGrants
Foundation Source	Foundation Source Online, Back-Office, Requests, Client Services
JK Group	Grants Management System with Online Applications

Major Commercial Grant Management System Vendors and their Products

Company	Major Products and Services • Announced for availability in 2007
<p>MicroEdge (includes NPO Solutions)</p>	<p>GIFTS, Essential GIFTS and optional modules, MyGIFTS, IGAM, ReviewerConnect, Matching GIFTS, Volunteer GIFTS, GIFTS Plus Pak .NET Extension, FIMS, FIMS Chart It, FoundationPower, IGAM, Advisor Xpress, Host*Net, Safety*Net, DAF</p> <ul style="list-style-type: none"> • PorticoGRM, • Portico Exec for FIMS, • Online Employee Involvement, • Additional GIFTS Plus Pack .NET Extension modules



Different Types of Applications and Services -or- *“What Runs Where?”*

1. Windows Applications

- | Windows software on an internal PC or server
- | Windows software on either internally or a vendor’s hosted Windows Terminal Server or Citrix Metaframe Web server to provide remote browser access

2. Web-based Applications

- | Web-based software on internal servers
- | Web-based software on a vendor’s hosted servers

3. Hybrid Windows and Web-based Applications

- | Windows software internally on servers and Web applications either internally or externally on a vendor’s servers

4. ASP Services

- | Web-based ASP service on vendor’s hosted servers
- | Web-based ASP service on vendor’s hosted servers with professional and back office services

See the Chart for the Most Current Information Provided by Commercial System Vendors

Major Commercial Grants Management Software and Service Providers – 2007

Vendor (Year of first software review)	Active Clients as of 12/31/07	GM Product Staff	Types of Clients	Currently Available Product/Services	Announced New Products, Features and Services (Due Anytime in 2007)	Supported Interoperability with Other Applications	Hosted or ASP Service	Technology Platform(s)
Altum (1988) 202-792-0000 www.altum.com info@altum.com 71718 Seward ... Green Drive Reston, VA 20190 Formerly Arlington Group, Inc. – ceased operations and sold Easygrants to Altum, Inc. in November 2005	8 Endo-grants clients 12 Federal clients using other products	~14 staff	Primarily large-to-medium-sized foundation, Federal (primarily NIH) agencies, Medical research organizations	<ul style="list-style-type: none"> Easygrants® <ul style="list-style-type: none"> – Application – Review – Progress Reports – Grants Management – Contact Management Quotex & Reports Management Suite Query Module High NCO Budget & Performance Management 	<ul style="list-style-type: none"> Online budget module (MFC Information) Advanced query tool integration Extensive online standard reports, including cash forecasting and financial activity Integration with Outlook SharePoint integration Personalized home page (by Easygrants) Knowledge Management (review assignment, portfolio analysis) Online help by topic and page Matching gifts A new online Application Service Provider (ASP) model Custom design services 	<ul style="list-style-type: none"> Microsoft Word, Excel & Outlook Crystal, Cognos and Access report writers Custom linked accounting systems Custom links to compliance verification services 	Licensed software Optional hosted and ASP services	Full Web browser application using .NET, XML, and open database backend Desktop client and database independent Supporting Internet Explorer, Firefox, & Safari – on Macintosh, Windows, and Linux/Unix clients
Bromekamp Company LLC (1979) 855-298-8857 www.bromekamp.com info@bromekamp.com 206 East Park Street Minneapolis, MN 55404-3522	195 clients 2 Intl	12 staff	Community, Corporate, Family, Operating, and Private foundation Government grantmaking agencies	<ul style="list-style-type: none"> First Point (grants, CRM) Corporate Pearl (grants, CRM, matching gifts, billers for checks, event tracking) Community Pearl (grants, CRM, fund accounting, fundraising) Pearl Companions <ul style="list-style-type: none"> – eGRANT – Peer Givecode – Peer NCOA (National Change of Address database) – Peer ACI (Automated Clearing House for direct deposit checks) – Peer Outlook Synchronizer – Peer to Chronicle – Peer Web Collector/Report – Bridge to QuickBooks Pearl Loan Servicing Pearl (CUSTOM) 	<ul style="list-style-type: none"> Always On – a new Web-based grants management system for small foundations 	<ul style="list-style-type: none"> Microsoft Word, Excel & Outlook GuideStar MapQuest Google ChoicePoint Bidder Insight for compliance verification QuickBooks Chitix MetaFrame HRIS import from eGRAH-T QuickBase (2007) 	Licensed software Optional hosted via Windows terminal Server or Citrix Server Custom Web browser solutions and grant reconciliation modules on the Web eGRANT online applications and reports	Web/Net running on Windows SQLNT/MSDE/MSRP Microsoft Access 2000/MSDE versions 97/2000/XP/2003 SQL Server 2000e

 InformationAgeAssociates

 Copyright © 2007, InformationAge Associates, Inc. ...
 47 Murray Road • Princeton, NJ 08543 USA • 609-924-6936 • www.iaa.com

[OVER FOR MORE INFORMATION →](#)

Available for download at: <http://www.iaa.com/resources.html>



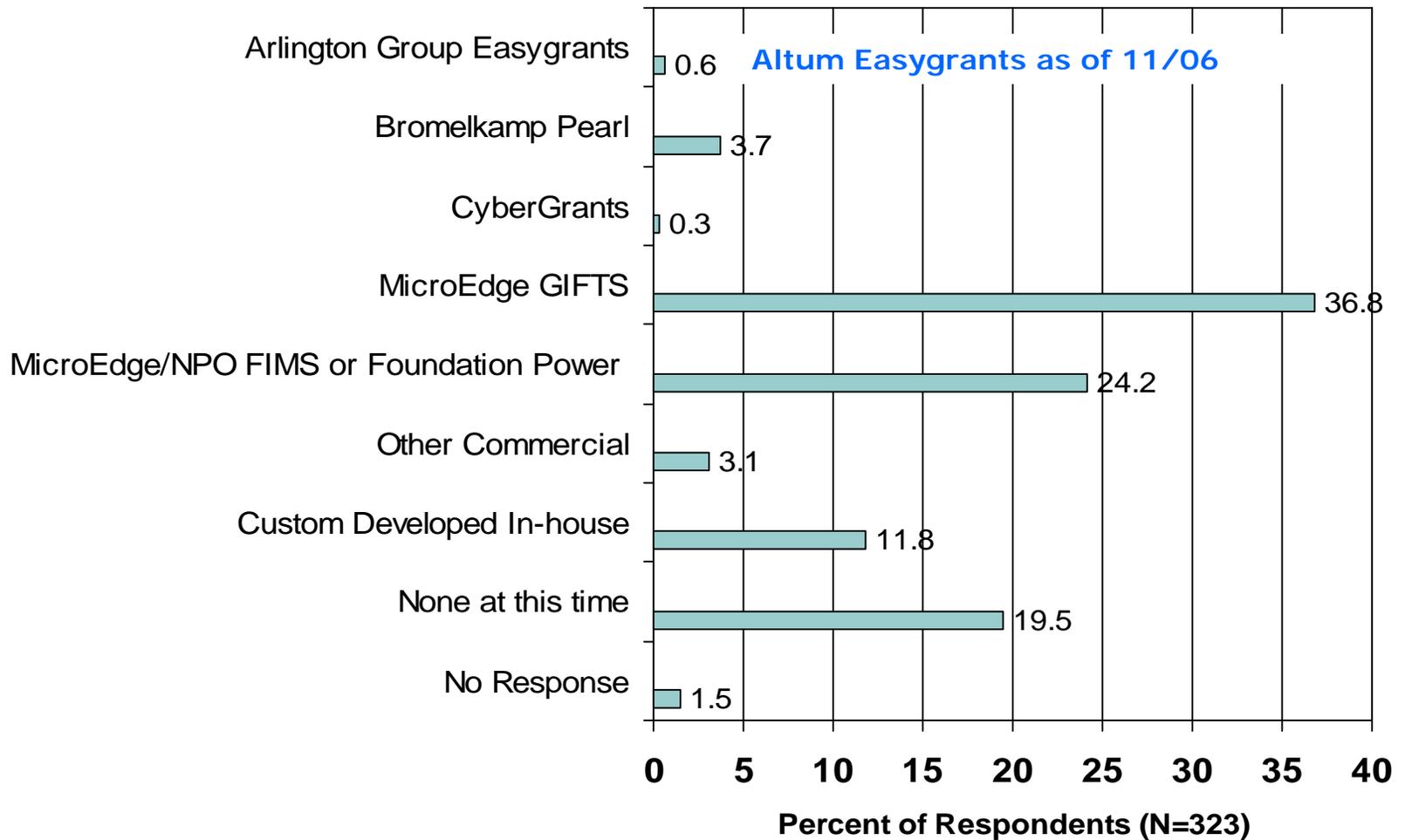
**2005 Grantmakers
Information Technology
Survey Report**

September 2005

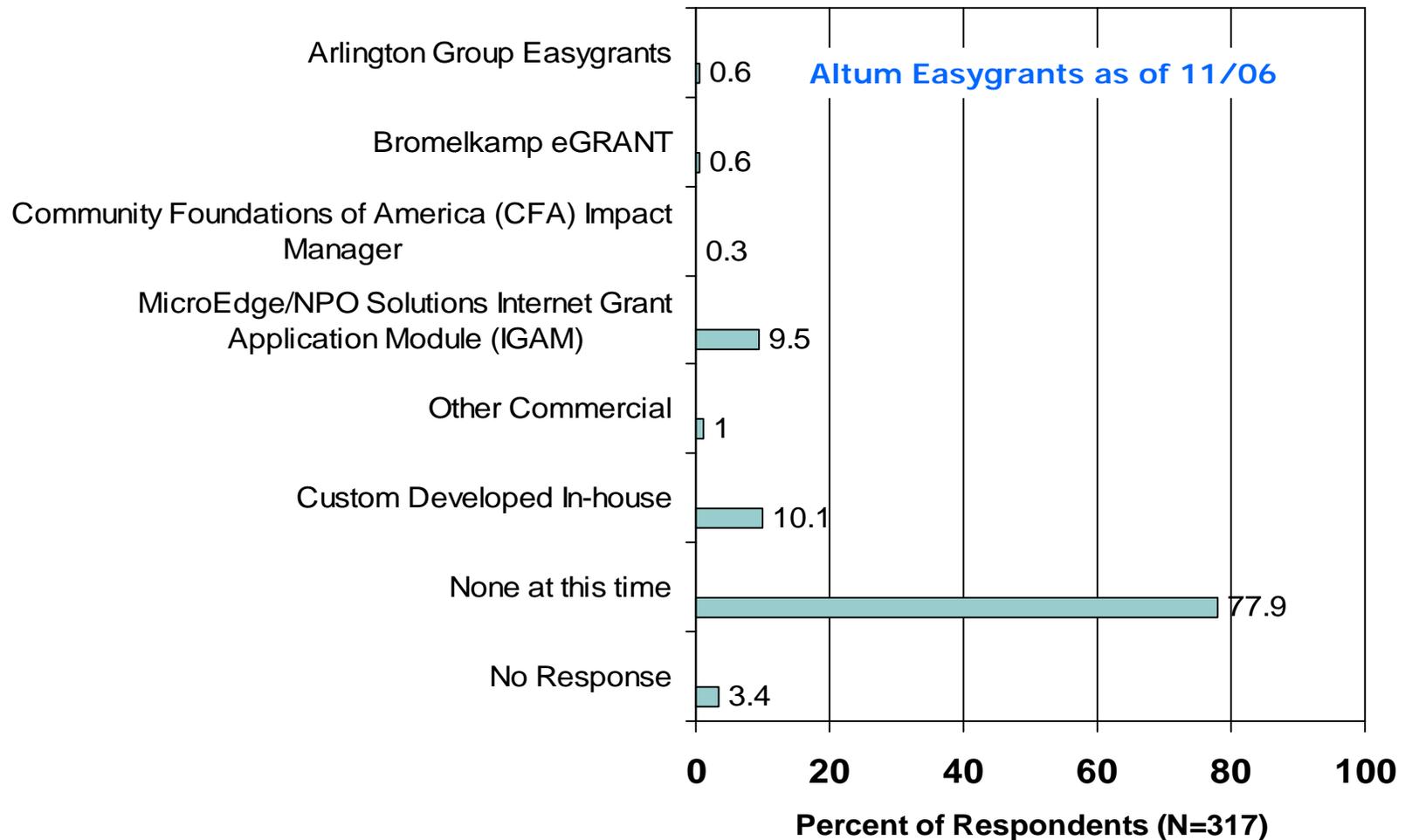
**Prepared jointly by
the Technology Affinity Group and
the Council on Foundations**

Download a copy of the report from <http://www.iaa.com/resources.html>

Primary Grant Management Software



Primary Online Grant Application Software or Service





Technology Issues That Grantmakers Report Are Most Difficult to Address

1. Online applications/donor services
2. Security
3. Integration of database and grants management software with other applications
4. Technology staffing and training
5. Expansion and maintenance of Web sites
6. Costs of keeping up with new technology
7. Mobile and wireless computing

Key Trends in Grants Management Software and Services

- i Continuing decline in the number of grants management vendors
- i Increased demand and availability of more flexible and powerful Web-based systems
- i “Self-service” approach of providing more information and interactive Web-based systems for grantseekers and grantees
 - i Growing use of online applications with eligibility quizzes and document attachments
 - i Online submission of progress and financial reports
 - i Nonprofits maintaining up-to-date contact and compliance information

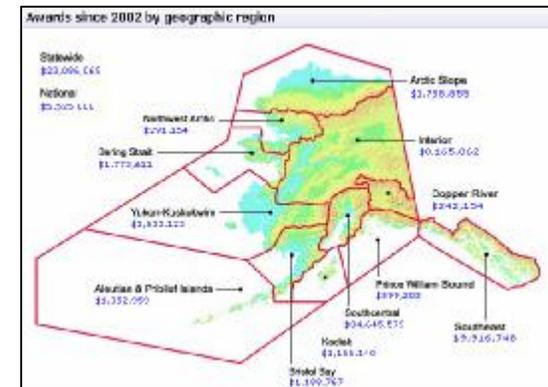


Key Trends in Grants Management Software and Services

i Demand for greater integration

- l Linking and presenting selected grant information on public Web sites and staff/board portals
- l Use of graphics to improve decision-making and presentation
- l Synchronization with Microsoft Outlook
- l OFAC compliance checking

i Increase in hosted and ASP services with pricing based on variables such as usage, number and amount of applications, grants, etc.



Some Key Questions for Foundation Information Systems Decision Makers

Defining Your Requirements

1. How well does your current grantmaking operation meet the goals in your strategic plan? How can it be improved?
2. What are the key capabilities and limitations of your existing system?
3. How complete, consistent, accurate and up-to-date is the data in your current system?
4. Can limitations be overcome by staff training, effective use of existing features, product upgrades, data cleanup and recoding, and/or integration with other applications?
5. Have you developed a detailed list of prioritized system requirements? Everything can't be "required" or "high".



Integrated Grants Management System Requirements - Ranked v2

IMPORTANT INSTRUCTIONS: Please describe your ability to meet each of our specified system requirements. Please do this by completing the Vendor Response column of this document. When doing this,

- 1 Currently available and is fully functional exactly as described in the latest production version of your product and/or service.
- 2 Similar but with some limitations compared with what is described. Then clearly describe all limitations.
- 3 Not currently available and, if shown as "Required" what you propose with a guaranteed delivery date and cost (if applicable) from the date of contract signing. Please clearly specify if your approach will be a
- 4 Targeted for future integration into the core system exactly as we've described for all clients vs. being specific to us. Please specify the guaranteed delivery date.

Function	Description	Required or Desired 5 = High 1 = Low	Vendor Response
----------	-------------	---	-----------------

LEGEND: Green=Required attachment Red=To drop requirement Blue=To discuss

User Interface

Web interface	Fully compatible with the latest and one prior version of Internet Explorer, Firefox and Safari (Macintosh only) on both Windows PC and Macintosh computers. <i>Please specify which versions are currently supported for each browser.</i>	Required	
Windows XP/Vista interface	Fully compliant with Microsoft's Windows XP workstation and Windows Vista user interface standard.	Required	
Ease-of-use	Graphic user interface that has uncluttered screens, facilitates navigation, and functions consistently with other supported Web and Windows applications.	Required	
Supervisor view	Ability for a supervisor to see the status of all proposal and grants assigned to selected staff.	Required	
Saving personal favorites	Saves personal settings of favorite queries, reports.	Required	
User-defined and stored custom settings	All application desktop configuration options are on a user (vs. browser or workstation) basis. This enables a user to easily operate from different locations and to upgrade to a new workstation with no need to reconfigure the system.	Required	
Customized user interface	Button bars and pull-down menus that can be customized by the system administrator for individual users and/or groups. Permits adding buttons to launch external applications (e.g. browser with a link to an external database).	5	
Collapsible code table listing	Code tables can be easily expanded and collapsed (<i>This is especially helpful for complex multi-level code tables</i>)	5	
Text searchable code tables	Code tables are easily searchable by entering text. This is especially helpful with large multi-level code tables.	5	
Full screen display	All screen displays (except pop-up windows) will display full screen regardless of the monitor size and display resolution. Text elements will be designed to fill the screen to make optimal use of display space regardless of screen resolution.	4	
Dynamic user interface	Dynamic user interface that displays only those functions and capabilities that users have the rights to access.	4	
Task list	A list of all tasks assigned to a user. Tasks are prioritized as: Current, Urgent, Complete, Rejected and Reassigned.	4	
Searchable online help	Online help that describes the capabilities of the system. Includes a searchable index.	3	
Personalized view by individual	Enables individual users to choose their own default startup view that specifies what data is presented and how it is sorted. The presentation of data can be filtered to display only those tasks that are the responsibility of the user. The user can change this at any time.	3	

Some Key Questions for Foundation Information Systems Decision Makers

Users

6. How many staff will be using the system to do what, how often and from where? (grant managers, administrative assistants, program officers, executives, trustees, grantees, etc.) In the future?
7. What is the level of grants management and computer expertise of each type of system user?



Grantmaking Operations

8. Is your grantmaking operation and workflow similar or different from other organizations? If different, then how and why? How willing are you to change this?
9. How likely is it that your grantmaking operation will change in the foreseeable future? In what specific way(s)?

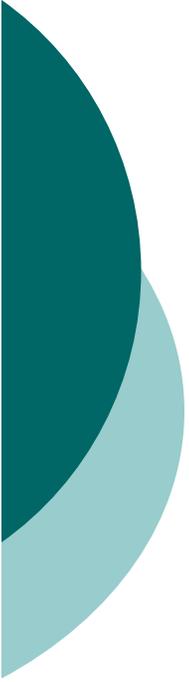
Key Questions for Foundation Information Systems Decision Makers

Integration

10. How do you need to integrate your grants management and other systems? How, why and frequency?

- | Public Web site
- | Foundation intranet/portal (e.g. SharePoint)
- | Microsoft Word and Excel
- | E-mail
- | Grantee research services
- | OFAC compliance services
- | Accounting system
- | Investment management systems
- | Donor Advised Funds
- | Knowledge management and search engines
- | Document management
- | Others?





Some Key Questions for Foundation Information Systems Decision Makers

Type of System, Platform, Support and Services

11. Can you adapt your operation to an existing commercial off the shelf (COTS) or application service provider (ASP) systems? Do you need a custom designed system?
12. What is your staff's level of technical expertise and availability to install, secure, integrate and provide ongoing support for your systems?
13. What workstation hardware do you use today? PC or Mac?
14. Would you consider or require a system that is hosted externally and accessible via a secure Web browser?
15. Do you need a service bureau that can provide some or all of the professional services to create a foundation and manage the complete grantmaking operation (e.g., legal, accounting, program, compliance, back office administration, etc.)? Which services?

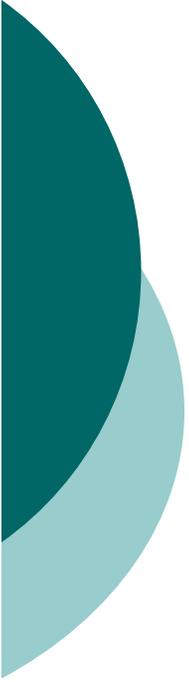
Some Key Questions for Foundation Information Systems Decision Makers

Costs

16. Have you developed estimates for cost related variables that will determine the up front, migration and ongoing cost of the system?

- | Number of individual and concurrent users
- | Number of applications, grants and reviews annually
- | Total foundation's assets under management
- | Volume, completeness, and consistency of data to be migrated and stored
- | Links to different systems





Some Key Questions for Foundation Information Systems Decision Makers

Vendor Background

17. Company, product and support information:

- | How large is their client base? Similarity to your organization? Is it continuing to grow?
- | Company profitability and level of investment in R&D
- | Low staff turnover and expertise with your type of grantmaking organization
- | Use of state-of-the-art technology
- | Level of client satisfaction and responsiveness
- | Training and system documentation
- | User support – availability of support specialists and online user and technical references
- | Service level agreements
(for all hosted, ASP services and service bureaus)
- | Do support contracts include new & improved features?

Some Capabilities of the Latest Generation of Integrated Foundation Information Systems



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- Secure full-featured system that enables cost effective internal use and remote access
- Powerful and intuitive user interface
- Contact relationship management (CRM) with one-to-many relationships
- Grantseekers and grantees can maintain up-to-date organization and contact information
- Web-based application forms with branching eligibility quizzes
- Online proposal review – internal, external reviewers and peer panels
- Document management with viewers and searchable content





Some Capabilities of the Latest Generation of Integrated Foundation Systems

- Customizable workflow management
- Integrated Tax ID and OFAC compliance verification
- Dynamic links to GuideStar, Charity Navigator, and Revenue Canada for due diligence research
- Requirement scheduling and tracking
- Online submission of reports
with automatic virus checking of all incoming files
- Program and grant evaluation



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ⌋ Built-in calendar that enables filtering
- ⌋ One-step mailmerge either with Microsoft Word or via a built-in Web application
- ⌋ One-step export to Excel
- ⌋ Flexible ad-hoc query with saved searches
- ⌋ Powerful and flexible report writer plus a library of standard reports that can be modified
- ⌋ Scheduled production and distribution of reports
- ⌋ User defined hierarchical coding structure
- ⌋ User-defined fields and calculated fields



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ▶ Synchronization with Outlook contacts
- ▶ Personalized interfaces for different users
(e.g., grant managers, program officers, senior management, board members)
- ▶ Selected grant information can be easily linked or exported for publishing on a Web site
- ▶ Database that ensures data integrity
- ▶ Utilities and services that facilitate recoding and restructuring data
- ▶ Collaborative online budget development and tracking



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- ⌚ Either built-in check writing/accounting or two-way links to accounts payable packages
- ⌚ Support of either cash or accrual accounting
- ⌚ Systems security and audit trails for key events
- ⌚ Support of foreign characters to record names with accents plus online applications in different languages
- ⌚ Multi-currency conversion for international grantmakers



Some Capabilities of the Latest Generation of Integrated Foundation Systems

- Support of industry standard database formats to facilitate interoperability with other applications
- Integration with SharePoint Web parts
- Professional training and support
- Active user groups, online discussions, presentations and conferences
- Context sensitive online documentation and comprehensive searchable knowledgebase





Time for spirited questions!