

# Grants Management Software and Service Providers – 2009

Vendor (Year of first grant software or service)	Active GM Clients as of 9/1/09	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2008-2009 (In multiple client production use as of 9/1/2009)	Supported Interoperability with Other Applications	Hosted / ASP Service	Technology Platform(s)
<b>Altum</b> (1998)  877-GO-ALTUM 703-657-8299 <a href="http://www.altum.com">www.altum.com</a> <a href="mailto:info@altum.com">info@altum.com</a>  12100 Sunset Hills Rd Suite 101 Reston, VA 20190	16 Easy-grants clients  43 proposal-CENTRAL clients  24 Federal clients using PC, EG and other Altum grant related solutions  3 non-US clients (1 PC, 2 EG)	35 staff	Medium-to-large foundations  Federal & State government agencies  biomedical grant-making organizations	<ul style="list-style-type: none"> <li>• Easygrants®                             <ul style="list-style-type: none"> <li>– Program Planning &amp; Management</li> <li>– Application</li> <li>– Review (internal and/or external; individual &amp; committee/panel)</li> <li>– Grantee Financial and Progress Reporting</li> <li>– Grants Management</li> <li>– Contact Management</li> <li>– Workflow Configuration</li> <li>– Integrated Document Management (SharePoint)</li> <li>– Queries &amp; Reports</li> </ul> </li> <li>• proposalCENTRAL®                             <ul style="list-style-type: none"> <li>– Application</li> <li>– Review</li> <li>– Progress Reports</li> <li>– Grants Management</li> <li>– Contact Management</li> <li>– Queries &amp; Reports</li> </ul> </li> <li>• Altum Query Module ®</li> <li>• Altum Financial Management and Costing Applications (based on Infor Performance Management )</li> </ul>	<ul style="list-style-type: none"> <li>• Easygrants                             <ul style="list-style-type: none"> <li>– Program management</li> <li>– Outcomes logic framework</li> <li>– Workflow &amp; task builder</li> <li>– PDF builder</li> <li>– Screen label manager</li> <li>– SharePoint integration (document management)</li> <li>– High throughput performance enhancements</li> <li>– Security management</li> <li>– 508 accessibility compliance</li> </ul> </li> <li>• proposalCENTRAL                             <ul style="list-style-type: none"> <li>– New module: outcome/ impact tracking &amp; program logic framework</li> <li>– Extensive modifications to support online committee/panel meetings: multiple downloads, online discussion, group voting</li> <li>– Enhance payment management (linked to progress reporting) &amp; standardized interfaces to accounting systems</li> <li>– Data collection &amp; export file for reporting to Foundation Center and HRA gHRAsp databases (grant award data sharing)</li> <li>– Expanded configurable data fields in post-award.</li> <li>– Ability to add awards that didn't go through the application/review process</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Word</li> <li>• Microsoft Excel</li> <li>• Microsoft Outlook</li> <li>• Microsoft SharePoint</li> <li>• Report Writers and Business Intelligence Software (e.g., Crystal, Cognos)</li> <li>• Custom links to accounting systems</li> <li>• Custom links to compliance verification service(s)</li> <li>• Custom links to CRM systems, internal authentication systems, and website content</li> <li>• Web services for interoperability with grant and ERP systems</li> </ul>	EasyGrants is offered as licensed enterprise software with optional hosting or as an ASP service  Proposal-CENTRAL is an ASP service	Web Browser user interface for all systems. Supports all major web browser platforms: Internet Explorer, Netscape, Opera, Firefox, & Safari – on Macintosh, Windows, and Linux/Unix clients  Architecture is predominantly Microsoft-based technology – .NET, IIS web server, SQL Server database, SharePoint document management.  Interfaces via open standards: .XML; Web services; SOAP

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<p><b>Bromelkamp Company LLC</b> (1979)</p> <p>888- 290-9087 <a href="http://www.bromelkamp.com">www.bromelkamp.com</a> <a href="mailto:info@bromelkamp.com">info@bromelkamp.com</a></p> <p>106 East 24th Street Minneapolis, MN 55404-3522</p>	<p>220 clients</p> <p>2 Intl.</p>	<p>14 staff</p>	<p>Community foundations Corporate foundations Family foundations Operating foundations Private foundations Government grantmaking agencies</p>	<ul style="list-style-type: none"> <li>• First Pearl (grants, CRM)</li> <li>• Corporate Pearl (grants, CRM, matching gifts, dollars for doers, event tracking)</li> <li>• Community Pearl (grants, CRM, fund accounting, fundraising)</li> <li>• eGrant.net (online grants application management tool) <ul style="list-style-type: none"> <li>– online applications and reporting</li> <li>– scholarship applications</li> <li>– online review</li> <li>– Application Status</li> </ul> </li> <li>• Pearl Companions <ul style="list-style-type: none"> <li>– Pearl Geocoder</li> <li>– Pearl NCOA (National Change of Address database)</li> <li>– Pearl ACH (direct deposit of grants and/or donor pledges)</li> <li>– Pearl Outlook Updater</li> <li>– Scan to Chronicle</li> <li>– Pearl Web Collector/Reporter</li> <li>– Bridge to QuickBooks or Peachtree accounting</li> </ul> </li> <li>• Pearl Loan Servicing (for PRI's)</li> <li>• Pearl (custom)</li> </ul>	<ul style="list-style-type: none"> <li>• eGrant.net <ul style="list-style-type: none"> <li>– advanced calculations</li> <li>– improved validation checks</li> </ul> </li> <li>• Pearl <ul style="list-style-type: none"> <li>– Enhanced document management</li> <li>– Enhanced unattended email correspondence</li> <li>– Automatic document storage</li> <li>– Enhanced GuideStar integration with automatic Charity Check recordkeeping</li> <li>– Grants/gifts payable automation</li> <li>– Integrated document scanning</li> <li>– Streamlined fund accounting interface</li> <li>– More powerful and flexible joint investment allocation, spendable allotment and fund fees assessment</li> <li>– Workflow processing agent</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Word</li> <li>• Microsoft Excel</li> <li>• Microsoft Outlook</li> <li>• GuideStar</li> <li>• MapQuest</li> <li>• Google</li> <li>• ChoicePoint</li> <li>• Bridger Insight for compliance verification</li> <li>• QuickBooks</li> <li>• Citrix MetaFrame</li> <li>• FIMS import from eGrant.net</li> <li>• Peachtree</li> </ul>	<p>Licensed software</p> <p>Optional hosted via Windows Terminal Server or Citrix Server</p> <p>Fundweb.net (donor statements and grant recommendations on the Web)</p> <p>eGrant.net online applications and reports</p>	<p>VB/VB.Net running on Windows 98/NT/2000/XP/VISTA</p> <p>Microsoft Access database versions 97/2000/XP/2003/2007</p> <p>SQL Server Sybase</p>

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<p><b>ChesterCAP</b> (2005 and previously by <a href="http://www.azcf.org">www.azcf.org</a> in 2002))</p> <p>888-333-2715 <a href="http://www.chestercap.com">www.chestercap.com</a> <a href="mailto:eric@chestercap.com">eric@chestercap.com</a></p> <p>14 Ridgedale Avenue Suite #130 Cedar Knolls, NJ 07927</p>	<p>10 clients</p> <p>0 Intl.</p>	<p>4 staff</p>	<p>Community foundations</p>	<ul style="list-style-type: none"> <li>• Dotche™: Comprehensive front office for the website <ul style="list-style-type: none"> <li>○ OLGA – Online grant &amp; scholarship management <ul style="list-style-type: none"> <li>- Component-based application form designer</li> <li>- Two-phase application (LOI/Full Proposal)</li> <li>- Budget module</li> <li>- Demographic module</li> <li>- Online Grant Reviews</li> <li>- Online Progress reports</li> <li>- Grant Mgmt Work flow (notification) module</li> </ul> </li> <li>○ Online Donor Services <ul style="list-style-type: none"> <li>- Fund status summary / donor statements</li> <li>- Grant Recommendations</li> <li>- Charitable Catalog (illustrated funding opportunities maintained by fund seekers)</li> <li>- Targeted philanthropic guidance (e-marketing)</li> </ul> </li> <li>○ CMS (Content Management System)</li> </ul> </li> <li>• PBO (Philanthropic Back Office): Back-office outsource for community foundations, using a Dotche™ web portal <ul style="list-style-type: none"> <li>- Gift Processing and acknowledgement</li> <li>- Financial fulfillment (Fee, accounts and grants payable processing with custom cover documents)</li> <li>- Unitized fund accounting</li> <li>- Financial Management (account consolidation, portfolio rebalancing, report generation)</li> </ul> </li> <li>• CAP (Charitable Advisor Platform): Turn-key DAF solution using the PBO</li> </ul>	<ul style="list-style-type: none"> <li>• Dotche™ <ul style="list-style-type: none"> <li>○ Online registration of new grantseekers (de-duping and gatekeeper features)</li> <li>○ Enhanced budget form design</li> <li>○ Due Diligence document tracking module</li> <li>○ Support for multiple review rounds, worksheets, and committees per proposal</li> <li>○ Scheduling tool for automatic delivery of multiple progress report surveys per grant</li> <li>○ Administrative configuration panel for setting hundreds of program options</li> <li>○ Enhanced donor grant recommendation worksheet</li> <li>○ Enhanced CMS (Content Management System) <ul style="list-style-type: none"> <li>- Dotche features can be surfaced as page parts (modules) anywhere on the website</li> <li>- Advanced page-level privileges console and menu system.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Dotche™ <ul style="list-style-type: none"> <li>○ API: Open data exchange via web services and xml <ul style="list-style-type: none"> <li>- Client for Progress database (FIMS)</li> <li>- Client for Sybase database (FP)</li> </ul> </li> </ul> </li> </ul>	<p>Dotche™ hosted at managed facility: Datapipe</p>	<p>The web application runs on Red Hat Linux, using the Apache mod/PERL web server to power the Perl-based framework. The database is PostgreSQL</p> <p>API: The web services are implemented in Java, using the Tomcat application server running Axis for web service handling. The client service is written in Java</p>

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<p><b>Closerware</b> (2005)</p> <p>203- 987-3339 212- 564-7010 <a href="http://www.GrantMaker.com">www.GrantMaker.com</a> sales@closerware.com</p> <p>4 Daniels Farm Rd #368 Trumbull, CT 06611</p>	23 clients	13 staff	Private foundations Family foundations	<ul style="list-style-type: none"> <li>• GrantMaker <ul style="list-style-type: none"> <li>– Apply - Publish any number of online application forms for your grants.</li> <li>– Centralize - Organize all of your applications and awarded grants in an easy-to-access web database.</li> <li>– Evaluate - Provide each of your evaluators with a unique login to securely review and download pending applications.</li> <li>– Communicate - Evaluators post ratings and comments for each application. Administrators provide feedback to applicants.</li> <li>– Award - Run aggregate reports on evaluator ratings and comments. Convert applications to awarded grants. Track post-award requirements and deliverables.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Bulk Update of Grant Applications - Set the status, user queue, grant assignment in bulk, saving you time and allowing more flexibility.</li> <li>• "Quick View" of Grant Applications - Improved administrative view of applications and awarded grants to easily review application data, review ratings and comments, and post award data.</li> <li>• Report Updates - The addition of further filtering options on reports, as well as further data fields to include in reports.</li> <li>• Usability Improvements <ul style="list-style-type: none"> <li>– Increased filtering options on list views.</li> <li>– Enhancements to generated intake forms.</li> <li>– Better display of file download links.</li> </ul> </li> </ul>	Product offers reporting and exporting utilities to extract any/all data into a CSV format to share with any outside application.	SaaS Includes 24x7 hosting, monitor, maintenance, data backups, security encryption, feature upgrades, training, and unlimited help desk support via phone and email.	<p>Entirely web based. The service only requires a modern browser and an Internet connection.</p> <p>Netscape 7.1 or higher, Internet Explorer 5.5 or higher, Mozilla Firefox 0.8 or higher, and Mozilla 1.3 or higher, on the PC.</p> <p>On the Macintosh and Linux platforms, the system works with Netscape 7.1 or higher, Mozilla Firefox 0.8 or higher, and Mozilla 1.3 or higher.</p>

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<b>Foundant Technologies</b> (2007)  877-297-0043 <a href="http://www.foundant.com">www.foundant.com</a> <a href="mailto:info@foundant.com">info@foundant.com</a>  P.O. Box 11888 Bozeman, MT 59718	111 clients as of 10/7/09  2 Intl.	11 staff	Family foundations Private foundations Community foundations Arts & Humanities funders Corporate Giving Programs Scholarship Organizations	<ul style="list-style-type: none"> <li>Grant Lifecycle Manager v1.7 (GLM)</li> <li>FaxToFile optional add-on</li> </ul>	<ul style="list-style-type: none"> <li>FaxToFile allows users to convert paper documents to electronic PDF format by faxing to a toll-free number</li> <li>Seven upgrade releases since Jan 2008 (each release includes new features, technical refactoring and bug fixes)</li> <li>PrintPacket functionality converts data gathered via online forms (applications, evaluator summaries, grant reports), including attached files, into single PDF file for offline access and/or printing</li> <li>Ability to design unlimited templates with integrated merge with Microsoft Word</li> <li>Manual grant entry allows easy entering of grants not initiated through online application forms</li> <li>Data Export features allows sophisticated selection of criteria for exporting data from system to standard CSV format</li> <li>Standard data export to support Foundation Center's eGrant reporting initiative</li> <li>Restricted Processes allow administrator to set an access code for invited applicants to access online forms</li> <li>Organization Summary view provides access to contact details, administrator notes, supporting documents and past granting history via single view</li> <li>Support for HTML tags for better formatting of online user forms – bold, italics, line breaks, bullets, numbers, links</li> </ul>	<ul style="list-style-type: none"> <li>Mail merge to Microsoft Word</li> <li>Export data to CSV/Excel</li> <li>Generate reports in Word, Excel, PDF, HTML formats</li> <li>CSV data exports used as import source for financial systems such as FIMS</li> </ul>	ASP standard for all clients	All Web browser interface supporting Internet Explorer Firefox and Safari

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<b>Foundation Source</b> (2001)  800-839-0054 <a href="http://www.foundationsource.com">www.foundationsource.com</a> contactus@foundationsource.com  55 Walls Drive Fairfield, CT 06824  Field offices in: Atlanta, Boston, Chicago, Denver, NYC, Philadelphia, Salt Lake City, San Francisco, Seattle	900 clients  2 Intl.	82 staff	Private Non-operating foundations: - Family and donor-led foundations - Professionally staffed foundations - Corporate foundations	<ul style="list-style-type: none"> <li>Foundation Source Back Office®</li> <li>Foundation Source Client Services™</li> <li>Foundation Source Online®</li> <li>Foundation Source Requests®</li> <li>Foundation Source Advisors</li> <li>Foundation Source Program Office</li> </ul> <p>Provides a full range of services to establish and administer private non-operating foundation and grantmaking programs</p>	<ul style="list-style-type: none"> <li>Custom report builder allowing any entitled user to build their own reports and publish them for use by other foundation members</li> <li>Email notifications of new grant request submissions</li> <li>Multiple users can be entitled to edit a grant letter throughout the granting and approval process</li> <li>User defined data fields that can be used to report on granting</li> <li>More customizable email templates</li> <li>Icons that indicate an organization's status with the IRS (i.e. public charity, supporting organization, etc.)</li> <li>Reminders of future payments coming due</li> <li>Homepage and other views can be customized by each user to suit their specific needs</li> <li>Public and private notes can be added to grants, grant requests, and charity profiles.</li> </ul>	<ul style="list-style-type: none"> <li>Wilmington Trust Retirement and Institutional Services Co.</li> <li>GuideStar</li> <li>Charity Navigator</li> <li>ChoicePoint Bridger Insight for compliance verification</li> <li>Reporting module with output to HTML, Microsoft Word, Excel and PDF formats.</li> </ul>	ASP standard for all clients	All Web browser interface supporting Internet Explorer Firefox and Safari (Macintosh) - all require 128-bit encryption  Underlying technology platform is a hosted, three-tiered application built on IBM DB2 and MS SQL Server databases
<b>Fusion Laboratories</b> (2004)  214-739-5454 <a href="http://www.fusionlabs.net">www.fusionlabs.net</a> Rgaulding@fusionlabs.net  15770 Dallas Parkway Suite 1100; LB 28 Dallas, Texas 75248	38 clients  2 Intl.  2 Managed Services Clients	25 staff	Community, Corporate, Faith Based Foundations  Philanthropic Service Providers	<ul style="list-style-type: none"> <li>GrantedGE</li> <li>"Proffer" Online Proposal and Scholarship Web Modules</li> <li>IT Assessments and Strategic Planning</li> <li>Custom Software and Web Development</li> <li>Managed Services</li> </ul>	<ul style="list-style-type: none"> <li>"Proffer" online proposal and scholarship Web modules</li> <li>Enhanced Financial Interface for ease of financial integration</li> <li>Enhanced scholarship processing</li> <li>Online application review and evaluation (due for release in 2009)</li> </ul>	<ul style="list-style-type: none"> <li>Microsoft Word</li> <li>Microsoft Excel</li> <li>Microsoft Outlook</li> <li>Microsoft Reporting Services</li> <li>Adobe PDF forms</li> <li>GuideStar</li> <li>Crystal Reports</li> <li>Blackbaud's Raiser's Edge</li> <li>Blackbaud's Financial Edge</li> <li>Blackbaud's NetCommunity</li> <li>QuickBooks</li> </ul>	Licensed Enterprise Software	Windows 32-bit, 64-bit servers Windows XP, Vista, Win-7 VB.Net MS SQL Server 2000, 2005, 2008 Support standard browsers incl. .IE, Firefox, Safari

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<p><b>JK Group</b> (2003)</p> <p>609-799-7830 <a href="http://www.easymatch.com">www.easymatch.com</a> <a href="mailto:info@easymatch.com">info@easymatch.com</a></p> <p>PO Box 7174 Princeton, NJ 08543</p>	<p>44 grants mgmt clients 5 with int'l giving in 20 countries</p> <p>260 clients, 35 with int'l programs for all other services</p> <p>2 non-US based clients</p>	<p>11 full-time staff for grants mgmt</p> <p>200 total staff</p>	<p>Corporations and Corporate foundations</p>	<ul style="list-style-type: none"> <li>• Web Based Grants Management system and services that are seamlessly integrated with all other JK Group applications including: <ul style="list-style-type: none"> <li>– Easymatch™ matching gifts</li> <li>– Employee giving campaigns</li> <li>– Disaster relief</li> <li>– Integrated Volunteer Management System</li> <li>– Dollars for Doers</li> <li>– Agency portal</li> </ul> </li> <li>• Online customizable Grant Applications</li> <li>• Full range of back office support services: <ul style="list-style-type: none"> <li>– U.S. and international organization vetting</li> <li>– USA PATRIOT Act compliance verification</li> <li>– Customer service to grantseekers and grantees</li> <li>– Processing checks, correspondence, unsolicited requests and declinations, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Multi-lingual application for grantees</li> <li>• Complete committee review process with rankings, weighted values and reporting abilities</li> <li>• Student registration and on-line scholarship applications where funding is disbursed to the college or university</li> <li>• Sponsorship applications where company can fund event &amp; then employees can sign up to attend</li> <li>• In-kind donations</li> <li>• RFP Process with employee initiation</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Word</li> <li>• Microsoft Excel</li> <li>• Adobe PDF</li> <li>• Customized Payables Exports</li> <li>• Bridger Insight for USA PATRIOT Act compliance verification</li> <li>• IRS Data base</li> </ul>	<p>ASP standard for all clients</p>	<p>Web Browser interface for all systems currently compatible with Microsoft Internet Explorer (all versions) Firefox Safari Opera Netscape Konqueror</p> <p>May 2007 upgrade from ASP to ASP.NET</p>

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<b>MicroEdge</b> (1985)  800-899-0890 <a href="http://www.microedge.com">www.microedge.com</a> <a href="mailto:info@microedge.com">info@microedge.com</a>  619 West 54th Street, New York, NY 10019  Announced 10/1/2009 acquired by Vista Equity Partners. <a href="http://www.vistaequitypartners.com">www.vistaequitypartners.com</a>  Field offices in: Cary, NC Concord, NH Excelsior, MN Kennesaw, GA Littleton, CO Middlebury, CT Pittsburg, PA Upper Marlboro, MD  Distributors in the UK and Australia	<p>More than 2,400 clients</p> <p>More than 200 int'l in 30 countries</p>	<p>Micro-Edge does not disclose this data</p>	<p>Private foundations</p> <p>Corporate foundations</p> <p>Family foundations</p> <p>Operating foundations</p> <p>Community foundations</p> <p>Financial institutions</p> <p>Attorneys / CPAs</p> <p>Service bureaus</p> <p>Research organizations</p> <p>Religious and university endowments</p> <p>Government grantmaking agencies</p>	<ul style="list-style-type: none"> <li>• GIFTS 6.2.1</li> <li>• Essential GIFTS 6.2.1</li> <li>• GIFTS Optional Modules <ul style="list-style-type: none"> <li>- GIFTS Plus Pack</li> <li>- MyGIFTS</li> <li>- Internet Grant Application Module (IGAM)</li> <li>- ReviewerCONNECT</li> <li>- Matching GIFTS</li> <li>- Volunteer GIFTS</li> <li>- Document Manager</li> <li>- AP Module</li> <li>- Branch Security</li> <li>- Budget Module</li> <li>- Customizer</li> <li>- Import Module</li> <li>- Reviewers Module</li> <li>- Check Writer</li> <li>- Foundation Center Export Tool</li> </ul> </li> <li>• Foundation Information Management Systems - FIMS 12™ <ul style="list-style-type: none"> <li>- DonorCentral</li> <li>- FIMS CRM</li> <li>- Portico Exec</li> <li>- Host*Net and Safety*Net</li> <li>- AP and GL</li> <li>- Scholarship Management</li> <li>- Pledge, Donor Relations &amp; Gift Management</li> <li>- FieldMaker</li> <li>- Pooled Investment Allocation</li> <li>- Stock Gifts</li> <li>- Donor Advised Fund</li> <li>- IGAM</li> <li>- FIMS Chart It</li> <li>- Financial Institution Interface Import Tool (with AST Trust Co.)</li> </ul> </li> <li>• FoundationPower™ Custom System</li> </ul>	<ul style="list-style-type: none"> <li>• GIFTS 6.2 <ul style="list-style-type: none"> <li>- Request Payment Update</li> <li>- Organizer Updates</li> <li>- Microsoft Windows Vista and Microsoft SQL Server 2005 certification</li> </ul> </li> <li>• GIFTS Plus Pack 4 and 5 <ul style="list-style-type: none"> <li>- Outcomes Plus</li> <li>- Link Plus for use with Outlook 2003 &amp; 2007</li> </ul> </li> <li>• IGAM 4 for GIFTS <ul style="list-style-type: none"> <li>- Progress reporting</li> <li>- Improved grantee My Account webpage</li> </ul> </li> <li>• FIMS 12 <ul style="list-style-type: none"> <li>- Flexible administrative fee calculations</li> <li>- Interoperability with third-party systems</li> <li>- Improved financial management</li> <li>- Ease of use enhancements</li> </ul> </li> <li>• MicroEdge FIMS CRM <ul style="list-style-type: none"> <li>- CRM capabilities integrated with FIMS</li> </ul> </li> <li>• IGAM 3 for FIMS <ul style="list-style-type: none"> <li>- Require applicant/account login</li> <li>- Seamless integration with FieldMaker fields</li> <li>- Require attachments</li> <li>- Multiple grantee contacts</li> <li>- Custom language display</li> </ul> </li> <li>• FIMS HostNet</li> <li>• All <ul style="list-style-type: none"> <li>- Enhanced Foundation Center Export Tool</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Word</li> <li>• Microsoft Excel</li> <li>• Microsoft Outlook</li> <li>• GuideStar</li> <li>• Canada Revenue Agency</li> <li>• CECF Corporate Giving Standard Survey</li> <li>• Attus Technologies, Bridger Insight and others for compliance verification</li> <li>• Accounting systems (GIFTS) <ul style="list-style-type: none"> <li>- AccPAC Plus</li> <li>- Acuity</li> <li>- Blackbaud AP</li> <li>- Blackbaud Financial Edge</li> <li>- Great Plains Dynamics and eEnterprise</li> <li>- Lawson</li> <li>- MIP Accounting</li> <li>- Oracle Financials</li> <li>- QuickBooks Pro</li> <li>- Quicken</li> <li>- SAP Financials</li> <li>- Solomon IV for Windows</li> </ul> </li> <li>• Crystal Reports</li> <li>• File viewers</li> <li>• Citrix MetaFrame</li> <li>• AST Trust - Seamless Processing</li> </ul>	<p>GIFTS, FIMS GIFTS, FIMS and FP all licensed software</p> <p>Hosted for IGAM, DonorCentral</p> <p>Host*Net, FIMS CRM</p> <p>Essential GIFTS Online and GIFTS Online (Limited Release)</p>	<p>GIFTS and Essential GIFTS - VB running on Windows 2000/XP/Vista Available in Microsoft Access, Microsoft SQL Server and Oracle server databases</p> <p>Web browser interface for IGAM and Reviewer CONNECT – supporting Internet Explorer, Safari, and Firefox all with SSL</p> <p>GIFTS Plus Pak - .NET</p> <p>FIMS - Progress</p> <p>Foundation Power – PowerBuilder/ Sybase</p>

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<b>NPower NY</b> (2009)  212- 564-7010 <a href="http://www.npower.org/services/foundation-grant-manager">www.npower.org/services/foundation-grant-manager</a> brad.helies@npowerny.org  3 Metrotech Center, Mezzanine Brooklyn, NY 11201	5 clients	10 staff	Small – Medium sized foundations Primary focus community and private foundations	Foundation Grant Manager Standard Offering: <ul style="list-style-type: none"> <li>• Eligibility Quiz</li> <li>• Letter of Inquiry</li> <li>• Grant Lifecycle</li> <li>• Grantee Reports</li> <li>• Communication Templates</li> <li>• Budget Tracking</li> <li>• Reports &amp; Dashboards</li> <li>• Board Reporting</li> </ul> FGM Community Edition: <ul style="list-style-type: none"> <li>• Includes Salesforce Nonprofit Starter Pack for fundraising</li> </ul>	New product as of 2009	<ul style="list-style-type: none"> <li>• MS Outlook</li> <li>• MS Excel</li> <li>• MS Word</li> <li>• Google Docs</li> <li>• iPhone</li> <li>• Blackberry</li> <li>• Windows Mobile</li> <li>• Palm OS</li> <li>• Lotus Notes</li> <li>• Constant Contact</li> <li>• Vertical Response</li> <li>• Facebook</li> <li>• Twitter</li> </ul>	100% Internet-based (hosted) solution  All database components reside in Salesforce Enterprise Computing Cloud  All constituent interactions via a web-portal hosted in Amazon Elastic Computing Cloud	Database layer is built on top of Salesforce  Web-portal layer is build in MS .NET
<b>PhilanTech</b> (2004)  888-784-7268 <a href="http://www.philantech.com">www.philantech.com</a> info@philantech.com  1875 I Street NW, Suite 500 Washington, DC 20006	32 clients  0 Intl.	4 FTE staff	Private foundations Corporate foundations Community foundations Nonprofit organizations	<ul style="list-style-type: none"> <li>• PhilanTrack™ Online Grants Management System               <ul style="list-style-type: none"> <li>– Grantee management (contact management, 501(c)(3) verification, activity history);</li> <li>– Online proposal management (eligibility quiz, tailored applicant questionnaires, complete applicant information, uploaded documents);</li> <li>– Thorough online progress reporting (automated grantee email reminders, tailored grantee questionnaires, complete grantee information);</li> <li>– Dynamic report generation (summaries, graphs, charts, viewed online or downloaded/printed for trustees);</li> <li>– Grantee financial</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Support for multi-stage application process (e.g., Letter of Inquiry to full proposal);</li> <li>• Grants to individuals (scholarships, fellowships);</li> <li>• Support for fiscal sponsors/payees other than grant recipient;</li> <li>• Extended financial analysis tool to draw from submitted proposals in addition to submitted reports;</li> <li>• Enhanced document management for awarded grants;</li> <li>• Enhanced funding cycle management (e.g., automatically closing a funding cycle to new applicants when deadline is reached; automatically opening for next round);</li> <li>• Improved grantee/applicant in-progress saving capability;</li> <li>• Improved data security;</li> <li>• Added “read only” board</li> </ul>	<ul style="list-style-type: none"> <li>• Microsoft Word</li> <li>• Microsoft Excel</li> <li>• Adobe PDF</li> <li>• FIMS (in progress)</li> </ul>	ASP standard for all clients	Web browser interface supporting Internet Explorer, Firefox, Safari, on both PC and Mac  Underlying technology platform is built in Python and PostgreSQL

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				analysis (unique grantee financial analysis tool evaluates grantee financial health and performance)	member access.			

**Sources:** Information shown in the table above was provided to IAA directly by each vendor / service provider in October 2009.

**Some additional U.S. and Canadian Commercial Grants Management Software and Online Application Vendors and Service Providers:**

CAMT – [www.egrant.org](http://www.egrant.org)

Common Grant Application - [www.commongrantapplication.com](http://www.commongrantapplication.com)

\* CyberGrants – [www.cybergrants.com](http://www.cybergrants.com)

Dulles Technology Partners – [www.dullestech.com](http://www.dullestech.com)

Grantium – [www.grantium.com](http://www.grantium.com)

GrantStream – [www.grantstream.com](http://www.grantstream.com)

PowerOFFICE – [www.poweroffice.info](http://www.poweroffice.info)

Stellar Financial - [www.stellarfinancial.com](http://www.stellarfinancial.com)

WESTAF – [www.westaf.org](http://www.westaf.org)

\* Vendor with significant market share invited but declined to report