

Grants Management Software and Service Providers - 2011

Vendor (Year of first grant software or service)	Active GM Clients on 1/1/2011	GM Product Staff	Types of Clients	Currently Available and Supported Products / Services	Delivered New Products, Features and Services in 2010 (In multiple client production in 2010)	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	19 Easy-grants clients 51 proposal-CENTRAL clients 26 Federal clients using PC, EG and other Altum grant related solutions 5 non-US clients (1 PC, 4 EG)	35 staff	Medium-to-large foundations Federal & State government agencies Biomedical grantmaking organizations	<ul style="list-style-type: none"> • Easygrants® (EG) <ul style="list-style-type: none"> – Program Planning & Management – Fund Source Tracking – 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, BI • proposalCENTRAL® <ul style="list-style-type: none"> – Application – Review – Progress Reports – Grants Management – Contact Management – Queries & Reports • Altum Query Module ® • Altum Financial Management and Costing Applications (based on Infor Performance Management) 	<ul style="list-style-type: none"> • Easygrants <ul style="list-style-type: none"> – Supervisor workload management – Personalized user home page (Favorite reports, grants, tasks, contacts) – Complex detailed budgets, including subcontract tracking – Business Rule Manager for easy configuration of task (e.g. application) validations – Additional workflow flexibility to allow tasks to be assigned to contacts, independent of a particular grant (enables tasks to be assigned to users or organization administrators like updating their profile). • proposalCENTRAL <ul style="list-style-type: none"> – Post award detail budget tracking – Attachments with system emails – Comprehensive e-mail logging – Extensive client-customizable grant coding & classification features for post-award – Added more client-customizable data fields – Multiple reviewer critique form configurations within a single committee – More granular security roles and access control 	<ul style="list-style-type: none"> • Microsoft Word • Microsoft Excel • Microsoft Outlook • Microsoft SharePoint • Foundation Center eGrant Reporting • 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 systems, and website content • Web services for interoperability with grant and ERP systems 	Easygrants is offered as licensed enterprise software with optional hosting or as a SaaS service Proposal-CENTRAL is a SaaS 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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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.	12 staff	Community foundations Corporate foundations Family foundations Operating foundations Private foundations Government grantmaking agencies	<ul style="list-style-type: none"> • Akoya.net (online grants, CRM) • 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) <ul style="list-style-type: none"> – online applications and reporting – scholarship applications – online review – Application Status • Pearl Companions <ul style="list-style-type: none"> – Fundweb.net (donor statements & grant recommendations on the Web) – 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) 	<ul style="list-style-type: none"> • eGrant.net <ul style="list-style-type: none"> – Transcript collection tool – Reference/ recommendation collection tool – Attach staff generated documents to applications or review groups – Advanced filtering in Review Module – Export scores, comments • Akoya.net <ul style="list-style-type: none"> – Online grants management – Option to work offline – Advanced reporting/querying tools – Powerful workflow and automation tools – Advanced CRM – Task and calendar management • Pearl <ul style="list-style-type: none"> – Improved Vendor tracking – Automated accrual accounting features – Enhanced budget tools – Automated import from eGrant – Enhanced accounting reports 	<ul style="list-style-type: none"> • Microsoft Word • Microsoft Excel • Microsoft Outlook • GuideStar • Electronic grant reporting to the Foundation Center • 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 recommendations on the Web) eGrant.net online applications and reports Akoya.net online grants management	VB/VB.Net running on Windows 98/NT/2000/XP/ Vista/Windows 7 Microsoft Access database versions 97/2000/XP/ 2003/2007/2010 SQL Server Sybase Microsoft Dynamics 2007/2010

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<p>ChesterCAP (2005 and previously by www.azcf.org in 2002)</p> <p>888-333-2715 www.chestercap.com eric@chestercap.com</p> <p>14 Ridgedale Avenue Suite #130 Cedar Knolls, NJ 07927</p>	<p>12 clients</p> <p>0 Intl.</p>	<p>9 staff</p>	<p>Community foundations</p>	<ul style="list-style-type: none"> • Dotche™: Comprehensive front office for the website <ul style="list-style-type: none"> ○ OLGA – Online grant & scholarship management <ul style="list-style-type: none"> - Component-based application form designer - Two-phase application (LOI/Full Proposal) - Budget module - Demographic module - Online Grant Reviews - Online Progress reports - Grant Mgmt Work flow (notification) module ○ Online Donor Services <ul style="list-style-type: none"> - Fund status summary / donor statements - Grant Recommendations - Charitable Catalog (illustrated funding opportunities maintained by fund seekers) - Targeted philanthropic guidance (e-marketing) ○ CMS (Content Management System) • PBO (Philanthropic Back Office): Back-office outsource for community foundations, using a Dotche™ web portal <ul style="list-style-type: none"> - Gift Processing and acknowledgement - Financial fulfillment (Fee, accounts and grants payable processing with custom cover documents) - Unitized fund accounting - Financial Management (account consolidation, portfolio rebalancing, report generation) • CAP (Charitable Advisor Platform): Turn-key DAF solution using the PBO 	<ul style="list-style-type: none"> • Dotche™ <ul style="list-style-type: none"> ○ Online registration of new grantseekers (de-duping and gatekeeper features) ○ Enhanced budget form design ○ Due Diligence document tracking module ○ Support for multiple review rounds, worksheets, and committees per proposal ○ Scheduling tool for automatic delivery of multiple progress report surveys per grant ○ Administrative configuration panel for setting hundreds of program options ○ Enhanced donor grant recommendation worksheet ○ Enhanced CMS (Content Management System) <ul style="list-style-type: none"> - Dotche features can be surfaced as page parts (modules) anywhere on the website - Advanced page-level privileges console and menu system. 	<ul style="list-style-type: none"> • Dotche™ <ul style="list-style-type: none"> ○ API: Open data exchange via web services and xml - Client for Progress database (FIMS) - Client for Sybase database (FP) 	<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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Closerware (2005) 203- 987-3339 www.GrantMaker.com sales@closerware.com 4 Daniels Farm Rd #368 Trumbull, CT 06611	29 clients	6 staff	Private foundations Family foundations	<ul style="list-style-type: none"> GrantMaker <ul style="list-style-type: none"> Apply - Publish any number of online application forms for your grants. Centralize - Organize all of your applications and awarded grants in an easy-to-access web database. Evaluate - Provide each of your evaluators with a unique login to securely review and download pending applications. Communicate - Evaluators post ratings and comments for each application. Administrators provide feedback to applicants. Award - Run aggregate reports on evaluator ratings and comments. Convert applications to awarded grants. Track post-award requirements and deliverables. 	<ul style="list-style-type: none"> Significant expansion of application form customization. <ul style="list-style-type: none"> Define form sections where applicants can step through the application. Applicants can expand and collapse sections. Applicants can save 'in-progress' applications and return at a later time to complete. Applicants can review previously submitted applications. New custom field type <ul style="list-style-type: none"> When defining custom fields for grant data you can now create on-the-fly custom fields in a matrix format to accept complex data. For example, a matrix for multi-year financial data. 	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.	Entirely web based. Applicants can use any browser on any platform. Administrators can use: On PC: Internet Explorer 5.5 or higher, or Firefox 0.8 or higher. On Macintosh and Linux: Firefox 0.8 or higher.
Common Grant Application (2008) A project of Oceanpeak, Inc. (310) 451-7520 info@commongrantapplication.com www.commongrantapplication.com 530 Wilshire Blvd, Suite 207 Santa Monica, CA 90401	5 grant-making clients 7,000+ grant-seekers	3 staff	Private foundations Family foundations Community foundations Giving circles	Common Grant Application grant management system and online application	<i>Messaging.</i> Messaging and e-mail system that supports system to user generated messages and e-mails that will be expanded to support user to user messages and e-mails. <i>Collaborative grantmaking.</i> Grantmakers can form ad-hoc groups and a single application can be submitted by the grantseeker to all members of the group. <i>Online grant agreements.</i> Grantmakers can manage Web-based grant agreements. <i>Board book compilation.</i> Quickly select and compile applications or evaluations into an online or printable board	Data can be imported from and exported to other applications using CSV, Excel files. Encoded links to GuideStar and other charity checking sites. Built-in support of Foundation Center eGrant Reporting	ASP service (hosted in Dallas and backed up to another offsite facility every evening).	The service is based on LAMP (Linux, Apache, MySQL, PHP) technology but all a user needs to use the service is a Web browser (since it is an ASP service). We explicitly support Internet Explorer 4.0 and later, Firefox 1.0 and later, Safari 3.0 and later. We have not had any reported issues with Chrome and

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					<p>book.</p> <p><i>QuickApply.</i> Grantseekers can follow a step-by-step process to fill out and submit an application.</p> <p><i>Multiple program support.</i> Grantmakers can manage receipt, sorting, assignment and evaluations on a per grantmaker program basis.</p> <p><i>Document management.</i> Extension to existing grantmaker document management capabilities so that grantmakers can upload, organize and manage site visit, board meeting and other documents.</p>			Opera.
<p>Dulles Technology Partners Inc. (DTPi) (1999)</p> <p>703-623-2128 www.dullestech.com info@dullestech.com</p> <p>817 Larch Valley Ct. Leesburg, Virginia 20176</p>	40 clients	8 staff	<p>Federal government State governments, Local governments Cities Universities Foundations Research organizations</p>	<ul style="list-style-type: none"> WebGrants product is designed to support grantors, organizations that give away grant money on a competitive and formula basis. MyWebGrants product is designed to support the grantees, organizations that receive grant money and implement projects. 	<p>DTPi developed the following new features:</p> <ul style="list-style-type: none"> Complete form creation using built in user defined form creator for applications, reviews, grants, status reports, claims and site visits. Complete ad hoc reporting tool to create reports on any data element in the system. 	<ul style="list-style-type: none"> Exports data to HTML, PDF, Word, Excel, CSV Data can be imported or exported via XML gateway or flat file Capable of doing OFAC lookups Integration with financial and/or automated payment systems possible Integration with central security service (LDAP, Active Directory, etc.) possible Most application servers supported including: JBoss, Weblogic, iPlanet, WebSphere, etc. 	<p>ASP hosted</p> <p>All data can be transmitted with up to 128-bit encryption</p>	<p>Based on Java (J2EE) platform technologies</p> <p>Most relational database management systems are supported including: MySQL, Oracle, SQL Server, DB2, etc.</p> <p>Most server OS including: Microsoft Windows, Mac, UNIX, Linux, etc.</p> <p>Web browsers supported including: Internet Explorer, Firefox, Safari, Opera, Chrome, etc.</p> <p>Most web servers</p>

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Foundant Technologies (2007) 877-297-0043 www.foundant.com info@foundant.com P.O. Box 11888 Bozeman, MT 59719	216 clients 4 Intl. - Canada	10 staff plus 5-6 contractors	Family foundations Private foundations Community foundations Arts & Humanities funders Corporate Giving Programs Scholarship Organizations	<ul style="list-style-type: none"> Grant Lifecycle Manager v2.1 (GLM) FaxToFile optional add-on GuideStar Charity Check Web Service optional add-on Migration/Import of historical data optional professional service 	<ul style="list-style-type: none"> Five upgrade releases in 2010 (each release includes new features, technical refactoring and bug fixes) Drag & Drop for re-ordering questions during design of online forms Copy any online form as a template for building another form Manual grant entry for staff to enter grants without need for application form Significantly enhanced access to system data via Data Export to CSV Ability to define Restricted grant programs where invited grantees must enter password Background auto save every 10 minutes Supporting documents manually attached to grant records now optionally included in PrintPackets Integration with GuideStar Charity Check via Web service results stored in GLM database Warning of duplicate organization creation via validation of EIN field All online forms returned to applicant/grantee by administrators for requested updates Ability to assign grant reports to users other than the original grant applicant Workload and dashboard pages filtered by grant process (i.e., see only activity for new program) Many enhancements on usability, navigation, etc. 	<ul style="list-style-type: none"> Mail merge to Microsoft Word Export data to CSV/Excel Generate reports in Word, Excel, PDF, HTML formats CSV data exports used as import source for financial systems such as FIMS Web Service connection to GuideStar Charity check for automated lookup via EIN Built-in support of Foundation Center eGrant Reporting Import historical data via Excel template Special tool for import of historical data from GIFTS databases 	ASP standard for all clients	supported including: Apache-Tomcat, iPlanet, etc. All Web browser interface supporting Internet Explorer Firefox and Safari Hosted MySQL database backend

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<p>Foundation Source (2001)</p> <p>800-839-0054 www.foundationsource.com contactus@ foundationsource.com</p> <p>55 Walls Drive Fairfield, CT 06824</p> <p>Field offices in: Atlanta, Boston, Chicago, Denver, New York City, Philadelphia, Salt Lake City, San Francisco, Seattle</p>	<p>965 clients</p> <p>2 Intl.</p>	<p>90 staff</p>	<p>Private Non- operating foundations Family and donor-led foundations Profession- ally staffed foundations Corporate foundations</p>	<ul style="list-style-type: none"> • Foundation Source Back Office® • Foundation Source Client Services™ • Foundation Source Online® • Foundation Source Requests® • Foundation Source Results® • Foundation Source Advisors • Foundation Source Program Office <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"> • FS Results®: a new module that simplifies the process for foundations to request reports from non-profits. The basic version provides functionality for ad-hoc report requests to be created at the time when the grant is made. The advanced functionality allows foundations to create forms and templates in advance that can be used in a structured way to measure the impact of a single or multiple payment grants. • The ability to add contact information directly into FS Online. The ability to send e-mail messages and also to create distribution groups. • A new Tax Center that provides up-to-date information on the status of the foundations tax return filing and action items for the foundation. • New and improved standard online reports. • New information panels to manage the relationship with a non-profit organization including a centralized overview of all pending or completed transactions and communications. • More detailed information of the fiscal year Annual Distribution Requirement. • More user defined email notifications and letters to improve communication with non-profits. 	<ul style="list-style-type: none"> • Wilmington Trust Retirement and Institutional Services Co. • GuideStar • Charity Navigator • ChoicePoint Bridger Insight for compliance verification • Reporting module with output to HTML, Microsoft Word, Excel and PDF formats. 	<p>ASP standard for all clients</p>	<p>Underlying technology platform is a hosted, three- tiered applica- tion built on IBM DB2 and MS SQL Server databases</p> <p>All Web browser interface supporting Internet Explorer Firefox and Safari (Macintosh) - all require 128-bit encryption</p>

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Fusion Laboratories (2004) 214-739-5454 www.GrantedGE.net www.Fusionlabs.net inquiries: mhall@fusionlabs.net 15770 Dallas Parkway Suite 1100; LB 28 Dallas, Texas 75248	48 clients	26 staff	Community foundations Corporate foundations Private foundations Faith Based foundations Philanthropic Service Providers	<ul style="list-style-type: none"> GrantedGE "Proffer" Online IT Assessments and Strategic Planning Custom Software and Web Development Managed Services 	<ul style="list-style-type: none"> Enhanced scholarship processing Online application review and evaluation Enhanced Reporting Advanced Workflow Processing of Grant Loans User Defined Field Calculations Enhanced Designated Grants Processing 	<ul style="list-style-type: none"> Microsoft Word Microsoft Excel Microsoft Outlook Microsoft Reporting Services Adobe PDF forms GuideStar Crystal Reports Blackbaud Raiser's Edge Blackbaud Financial Edge Blackbaud NetCommunity QuickBooks Built-in support of Foundation Center eGrant Reporting 	Licensed Enterprise Software Running either on client servers or via Terminal Services and Citrix on hosted Fusion Labs or Blackbaud servers	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 and Safari
Good Done Great (2009) 501-463-6478 www.gooddonegreat.com 4740 25th Ave. SW Seattle, WA 98106	15 clients 0 Intl. Includes 2 state-level affiliate systems with 96 Community Foundations	5 staff	Community foundations Private foundations Family foundations Corporate foundations	GDG Online Grant Management system GDG Online Scholarship Management system	<ul style="list-style-type: none"> Agency Profile portal <ul style="list-style-type: none"> – Print option for apps – Lost password Online Applications <ul style="list-style-type: none"> – Enhanced Word/Character Count – Enhanced Eligibility Quiz Application Evaluations/Reviews <ul style="list-style-type: none"> – Optional "Blind" evaluations – Customizable Review web forms Grant / Application Administration Notices on Time sensitive deadlines, Administration <ul style="list-style-type: none"> – Published APIs for integration with 3rd party 	<ul style="list-style-type: none"> Mail merge to Microsoft Word Export to Excel Import/Export via CSC, XML, txt CSV data exports to FIMS, GIFTS, Blackbaud (RE/FE/GE), other financial and/or 3rd party systems IRS BMF, and Publication 78 files populated directly from the IRS data sources Built-in data export to Foundation Center's eGrant Reporting standard 	100% Internet-based (ASP) solution, hosted by Intuit Intuit hosts application in same facility as TurboTax (hosting, monitoring, disaster recovery, backups, security, etc. provided)	Backend Database is Intuit's QuickBase Application User Interface and programming done using native QuickBase or using jquery, Ruby, heroku, html and other web 2.0 technologies. Technology enhancements (html, JavaScript, integration toolset) Support all major browsers (IE, Firefox, Chrome, Safari, Konqueror, etc.)

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Grantium (1998) (866) 417-0007 www.grantium.com info@grantium.com 2111 Wilson Blvd. Suite 700 Arlington, Virginia 240-506-5528 Acquired by CSDC Systems Inc. Mississauga, ON CANADA March 2010 www.csdcsystems.com Offices in: Ft. Worth, Ottawa, Toronto, Vancouver Solution partners: CGI Federal Solutions Deloitte NeoSpire Managed Hosting Turner Consulting Group http://www.grantium.com/clients-and-partners/solution-partners	23 9 US 14 CDN	50 grants staff 160 total staff	U.S. State and Federal Government Canadian Provincial and Federal Government Municipal Government Large foundations Scholarship organizations Banking organizations	<ul style="list-style-type: none"> • G3™ Enterprise Grants and Scholarship Management Software <ul style="list-style-type: none"> ○ <i>Front Office</i> – public facing applicant portal accessible via web browser to where applicants find funding opportunities, register profiles, submit applications, receive status updates, receive notifications and correspond with project staff ○ <i>Program Office</i> – all functionality required by program staff to support grant and scholarship program administration including: <ul style="list-style-type: none"> – Intake – Evaluation – Award – Project Monitoring – Project Closeout ○ <i>Back Office</i> – provides extension points for integrations and customizations • G3™ Business Intelligence <ul style="list-style-type: none"> ○ Standard reports ○ Professional custom reports ○ Ad-hoc reports ○ Dashboards 	New Products: <ul style="list-style-type: none"> • G3™ Business Intelligence New Features/Enhancements: <ul style="list-style-type: none"> • Reporting Platform Enhancements <ul style="list-style-type: none"> ○ Dynamic ETL ○ Enhanced Data Mart • Project Office Group Assignment to Steps • Shared and Multiple Submission Evaluation Enhancements • Improved Data Retrieval through List Enhancements • Amendment Enhancements • Direct Access “Apply Now” feature • Data Import /Export Enhancements • Improved Usability with Form Configuration Enhancements • Bring Forward from Multiple Historical Funding Opportunities • Download Support Package • Duplicate Project Checking Enhancement • Certification for Oracle 11g and WebLogic 11g 	G3™’s Back Office provides extension points for integration with a wide variety of 3 rd party software, subscription services and databases. API’s are included as part of core G3™ software and permit bi-directional exchange of data via web services and XML. Commonly supported integrations include: <ul style="list-style-type: none"> • Grants.gov • Data warehouses, 3rd party reporting tools, Business intelligence software (e.g. Crystal, Cognos) • Authentication integration toolkit LDAP & Active Directory • Financial System integration toolkit i.e. SAP, Momentum, PeopleSoft • Document Management Integration toolkit • Custom scoring and evaluation algorithms • XML-based data import from legacy systems 	G3™ is offered as Licensed Enterprise Software With optional SAS-70 approved Hosting Services in both the U.S. and Canada	Fully Web based using Java EE development platform Major Web Browsers Supported Include: IE 6.02, 7.0, 8.0 Firefox 3.0, 3.5 Safari 4.0 Application Server - Deployable with any J2EE 1.4 compliant application server Database Server - Certified with Microsoft SQL Server 2008 and Oracle 10gR2 and 11gR2 G3™ includes a built-in Data Mart Builder component to transfer G3™ data into a format optimized for reporting for storage in the G3™ Data Mart

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<p>GrantStream (2000)</p> <p>905-339-3852 www.grantstream.com</p> <p>info@grantstream.com</p> <p>1540 Cornwall Road Suite 204 Oakville, Ontario CANADA</p>	<p>70 clients</p> <p>3 – U.S. + multiple U.S.- based users</p> <p>2 – UK</p> <p>1 – Nether- lands</p>	<p>30 staff</p>	<p>Mostly corporations</p> <p>Some private foundations</p>	<ul style="list-style-type: none"> GrantRight® for managing external requests GrantRight® Measurement & Evaluation module HostRight™ for corporate event and hospitality activities. MatchRight® for employee programs MatchRight® UW for United Way campaigns ScholarRight™ for corporate scholarship, fellowship and bursary programs. <p>Custom system based on core technology engine for the management of corporate donation and sponsorship requests</p>	<ul style="list-style-type: none"> Enhanced e-mail notification management Improved workflow management Improved check requisition management Improved application form engine <p>Planned for 2011</p> <ul style="list-style-type: none"> MatchRight Plus: will include expanded employee program and volunteer capability 	<ul style="list-style-type: none"> Custom solutions for SAP, EZ Buy and Oracle IRS charity database UK charities database Canada Revenue Agency database 	<p>Hosted ASP solution only.</p> <p>Class A data Canadian hosted facility TELUS Toronto Internet Data Centre</p>	<p>Web-based application only with data transmitted using 128-bit Secure Socket Layer (SSL) encryption</p> <p>Runs under Zend® Server (Apache+SSL 2.2.x, and PHP 5.x), an enterprise PHP platform on Red Hat Enterprise Linux, with a Microsoft® SQL Server® 2008 running on Windows Server® 2008.</p> <p>Supported browsers for application form (front end):</p> <ul style="list-style-type: none"> Internet Explorer 6.0+ Firefox Opera 7+ Google Chrome Safari 2+. <p>Supported browsers for management interface (back end):</p> <ul style="list-style-type: none"> Internet Explorer version 6.0+.

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JK Group (2003) 609-799-7830 www.easymatch.com pkalomeris@easymatch.com P.O. Box 7174 Princeton, NJ 08543	44 grants management clients 5 with int'l giving in 20 countries 280 clients, 40 with int'l programs for all other services 3 non-U.S. based clients	11 full-time staff for grants mgmt. 205 total staff	Corporations and Corporate foundations	<ul style="list-style-type: none"> Web-based Grants Management system and services that are seamlessly integrated with all other JK Group applications including: <ul style="list-style-type: none"> Easymatch™ matching gifts Employee/payroll giving campaigns Disaster relief Integrated Volunteer Management System Dollars for Doers Agency Portal Online customizable Grant Applications Full range of back office support services: <ul style="list-style-type: none"> U.S. and international organization vetting USA Patriot Act compliance verification Customer service to grant seekers and grantees Processing/issuing checks, correspondence, unsolicited requests and declinations, etc. 	<ul style="list-style-type: none"> Multi-lingual application for grantees Complete committee review process with rankings, weighted values and reporting abilities Student registration and on-line scholarship applications where funding is disbursed to the college or university Event/Sponsorship applications where company can fund event & then employees can sign up to attend In-kind donations RFP Process with agency or employee initiation 	<ul style="list-style-type: none"> Microsoft Word Microsoft Excel Adobe PDF Built-in support of Foundation Center eGrant Reporting Customized Payables Exports Bridger Insight for USA Patriot Act compliance verification IRS Data base 	ASP standard for all clients	Web Browser interface for all systems currently compatible with Microsoft Internet Explorer (all versions) Firefox Safari Opera Netscape Konqueror Chrome May 2007 upgraded from ASP to ASP.NET
MicroEdge, LLC (1985) 800-899-0890 www.microedge.com info@microedge.com 619 West 54th Street, New York, NY 10019 Announced 10/1/2009 acquired by Vista Equity Partners. www.vistaequitypartners.com	More than 2,400 clients More than 200 int'l in 30 countries	116 staff	Private foundations Corporate foundations Family foundations Operating foundations Community foundations Financial institutions Attorneys / CPAs Service	<ul style="list-style-type: none"> GIFTS 6.2.1 Essential GIFTS 6.2.1 GIFTS Optional Modules <ul style="list-style-type: none"> GIFTS Plus Pack Core MyGIFTS Internet Grant Application Module (IGAM) ReviewerCONNECT Matching GIFTS Volunteer GIFTS Document Manager AP Module Branch Security Budget Module Customizer 	GIFTS <ul style="list-style-type: none"> Request Payment Update Organizer Updates Microsoft Office and Microsoft SQL Server 2010 certification MyGIFTS and ReviewerCONNECT v3.5 Improved communication around proposal review Enhanced security GIFTS Plus Pack Windows Office 2010 Compatibility IGAM 4 for GIFTS 	<ul style="list-style-type: none"> Microsoft Word Microsoft Excel Microsoft Outlook GuideStar Built-in support of Foundation Center eGrant Reporting IRS Nonprofit Business Master file (IGAM) Canada Revenue Agency CECP Corporate Giving Standard Survey 	GIFTS, FIMS GIFTS, FIMS and FP all licensed software Hosted for IGAM, DonorCentral, FIMS, Host*Net, FIMS CRM, GIFTS Online	GIFTS and Essential GIFTS - VB running on Windows 2000/XP/Vista/Windows 7 Available in Microsoft Access, Microsoft SQL Server and Oracle server databases Web browser interface for IGAM and

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<p><i>Additional R&D, service and support offices in:</i></p> <p><i>Concord, NH Excelsior, MN Middlebury, CT</i></p> <p><i>Field offices in:</i></p> <p><i>CA, CO, GA, IL, MD, NC, NJ, TX, WI</i></p> <p><i>Distributors in the UK and Australia</i></p>			<p>Bureaus Research Organizations Religious and University Endowments Government grantmaking agencies</p>	<ul style="list-style-type: none"> - Import Module - Reviewers Module - Check Writer - Foundation Center Export Tool - System Developer's Kit (SDK) that's an API • GIFTS Online 2.61 <ul style="list-style-type: none"> - Online applications and reporting - Budget - Internal reviews - External reviews - Branch security • Foundation Information Management Systems – FIMS <ul style="list-style-type: none"> - DonorCentral - FIMS CRM - Portico Exec - FIMS Host*Net and Safety*Net - AP and GL - Scholarship Management - Pledge, Donor Relations & Gift Management - FieldMaker - Pooled Investment Allocation - Stock Gifts - Donor Advised Fund - IGAM for FIMS - IGAM Scholarships - FIMS Chart It - Financial Institution Interface Import Tool (with AST Trust Co.) • FoundationPower™ Custom System <ul style="list-style-type: none"> - IGAM - DonorCentral - Portico Exec 	<ul style="list-style-type: none"> - Progress reporting - Improved grantee My Account webpage • GIFTS Online 2.0 <ul style="list-style-type: none"> - Integrated budget module - Online grantee reporting • GIFTS Online 2.5 <ul style="list-style-type: none"> - External reviews - Batch correspondence • FIMS 12.5 <ul style="list-style-type: none"> - Graphical viewer to provide presentation quality reports - Import utilities for profiles and A/P vouchers - Windows 7 and Office 2010 compatible - Ease of use and multi users enhancements • IGAM 4 for FIMS <ul style="list-style-type: none"> - Eligibility Quiz reporting - Enhanced field functionality on forms - Customize notifications and correspondence - Ability to customize display language on forms - Pre-populate applications with contact info from last submission - Ability to email a printer-friendly version of application and any attached documents to others for review and input • IGAM Scholarships* <ul style="list-style-type: none"> - Accept online scholarship applications <p><i>* Requires IGAM 3 or IGAM 4 for FIMS</i></p>	<ul style="list-style-type: none"> • Attus Technologies, Bridger Insight and others for OFAC compliance verification • Accounting systems (GIFTS) <ul style="list-style-type: none"> - AccPAC Plus - Acuity - Blackbaud AP - Blackbaud Financial Edge - Great Plains Dynamics and eEnterprise - Lawson - MIP Accounting - Oracle Financials - QuickBooks Pro - Quicken - SAP Financials - Solomon IV for Windows • Crystal Reports • File viewers • Citrix MetaFrame • AST Trust - Seamless Processing • API for GIFTS 		<p>Reviewer CONNECT – supporting Internet Explorer, Safari, and Firefox all with SSL</p> <p>GIFTS Plus Pak - .NET</p> <p>GIFTS Online – VB/ .NET, Microsoft SQL server database – Web browser interface supporting Internet Explorer and Firefox</p> <p>FIMS - Progress</p> <p>Foundation Power – PowerBuilder/ Sybase</p>

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NPower (2009) 212-564-7010 www.npower.org/fqm brad.helies@npower.org 3 Metrotech Center, Brooklyn, NY 11201	11 clients	10 staff	Private & Community foundations Nonprofits awarding scholarships	FoundationConnect (formerly <i>Foundation Grant Manager - FGM</i>) Standard Offering: <ul style="list-style-type: none"> • Eligibility Quiz • Letter of Inquiry • Online Applications • Review & Approval Workflows • Grantee Reports • Communication Templates • Custom Coding /Classification • Program & Budget Tracking • Reports & Dashboards • Board Reporting • Salesforce.com CRM 	Fall 2010 Release <ul style="list-style-type: none"> • <i>Applicant Profiles:</i> applicants can manage contact & login info through a profile page in the FGM Portal. • <i>Application Auto-Save:</i> FGM Portal auto saves applicants work before timeout. • <i>Preview Function:</i> applicants can preview / print their application at any time. • <i>FGM Portal Enhancements:</i> simpler control of help text and validation rules in the FGM Portal. • <i>Online Documentation:</i> searchable FGM documentation accessible from within Salesforce. • <i>Customer Portal:</i> FGM clients can submit & promote product ideas, post & respond to questions w/ the entire FGM community of users, and submit support cases. 	<ul style="list-style-type: none"> • Microsoft Word • Microsoft Excel • Microsoft Outlook • Google Docs • iPhone / iPad • Blackberry • Windows Mobile • Palm OS • Lotus Notes • Constant Contact • Vertical Response • Conga Composer • Facebook • Twitter • 501c3 Verification: Includes automated services to pull all data available from the IRS Master Business File • <i>Accounting Package Integration:</i> Salesforce provide robust tools for data CSV export /import as well as an open API for automated interfaces, there are also a variety of third party integration tools available 	100% Internet-based hosted solution All database components reside in Salesforce Enterprise Computing Cloud Constituent interactions via a web-portal hosted in Amazon Elastic Computing Cloud	Database layer is built on top of Salesforce Web-portal layer is built in MS .NET 100% Web based including support for: Firefox, Internet Explorer, Chrome, & Safari browsers

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<p>PhilanTech (2004)</p> <p>888-784-7268 www.philantech.com info@philantech.com</p> <p>1875 I Street NW, Suite 500 Washington, DC 20006</p>	<p>34 clients</p> <p>0 Intl.</p>	<p>4 staff</p>	<p>Private foundations Corporate foundations Community foundations Nonprofit organizations</p>	<ul style="list-style-type: none"> • PhilanTrack® Online Grants Management System <ul style="list-style-type: none"> – Grantee management (contact management, 501(c)(3) verification, activity history); – Online proposal management (eligibility quiz, tailored applicant questionnaires, complete applicant information, uploaded documents); – Thorough online progress reporting (automated grantee email reminders, tailored grantee questionnaires, complete grantee information); – Dynamic report generation (summaries, graphs, charts, viewed online or downloaded/printed for trustees); – Grantee financial analysis (unique grantee financial analysis tool evaluates grantee financial health and performance) 	<ul style="list-style-type: none"> • Data export – export to CSV for grant, grantee, proposal information • Data access – implemented application programming interface (API) for database level access to information • FIMS integration • New report – demographic information; better visual display of quantifiable information • “Rolled up” report for foundations with grantees who re-grant funds to roll up information across grantees and sub-grantees • Enhanced filtering of information in reports • Available collaboration support between applicants and funder on proposals • Improved graphic display of financial analysis • Enhanced support for organizations with fiscal sponsors, including eligibility quiz support • Improved ease of management of overdue submissions 	<ul style="list-style-type: none"> • Generate reports in HTML or CSV, export to Word or PDF • Microsoft Word • Microsoft Excel • Adobe PDF • Email clients (e.g., Outlook) • Built-in support of Foundation Center eGrant Reporting • CSV exports can be used to import into other foundation systems • FIMS (customized export for import to FIMS using importer; automated export/sync from FIMS to PhilanTrack) • Available API 	<p>Hosted solution (SaaS) standard for all clients</p>	<p>Web browser interface supporting Internet Explorer, Firefox, Safari, on both PC and Mac</p> <p>Underlying technology platform is built in Python and PostgreSQL</p>

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SmartSimple (2003) www.smartsimple.com sales@smartsimple.com 111 Peter St. Suite 405 Toronto, Ontario Canada, M5V 2H1 (416) 591-1668 405 Lexington Ave. 25th Floor Chrysler Building New York, NY 10174 (866) 239 0991 40 Kingram Place Dublin 2, Ireland 353 (0) 1 662 9236	30 clients 28 non- U.S.	12 staff for grants manage ment 5 in UK and 7 in Canada 30+ total staff	Private foundations Community foundations Corporate foundations Grantmaking public charities Government agencies Nonprofit organizations Universities	<i>Services for all systems</i> <ul style="list-style-type: none"> Fully integrated tools - surveys, e-mail broadcast, discussion groups No cost on demand CRM Online budget builder Workflow and report subsystem Powerful database and document search <i>GMS360</i> <ul style="list-style-type: none"> Track and manage full grants lifecycle Optional donation and volunteer management applications <i>Community Foundations 360</i> <ul style="list-style-type: none"> Track and manage donor programs and donor advised funds Promote collaboration and communication between funders and charities <i>CSR360</i> <ul style="list-style-type: none"> Track and manage full grants lifecycle Track and manage employee and community volunteer initiatives and participants Manage employee matching gifts program <i>RMS360 (Research Management System)</i> <ul style="list-style-type: none"> Track and manage research funding and outcomes such as commercialization Common resume (CV) Create and manage reviewer panels 	<ul style="list-style-type: none"> On-line budget builder Offline functionality (PDF uploads that populate application forms and grantee reports) Employee Matching Gift functionality Employee Giving/Campaign Management Report Server option for transferring data from SmartSimple to industry standard reporting and analytics tools Group e-mail functionality Foundation Center eGrant Reporting IRS lookup OFAC lookup Canadian Revenue Agency lookup Inland Revenue lookup (UK) 	<ul style="list-style-type: none"> Microsoft Office – Word, Excel and Outlook plug-ins tested against all versions including 2003, 2007 and 2010 QuickBooks, AccPac, SAP accounting systems – customers have integrated with various versions Microsoft Windows XP and 7 – MS Office plug-ins tested in XP and Windows 7 .Net API Web Service API AJAX API IBM FileNet Built-in support of Foundation Center eGrant Reporting 	Hosted SaaS Dedicated Managed Servers Optional in house installation	Internet Explorer versions are supported on the same schedule as Microsoft <ul style="list-style-type: none"> Firefox's current and previous versions are supported MySQL – used as backend database version 5.1 Linux (CentOS) Tomcat Apache HTTP Server Microsoft SQL Server – Only applicable with report server option

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Solpath (2010) www.projectfluxx.org info@solpath.org Twitter @jasonricci 415-860-6326 301 Battery Street 5th Floor San Francisco, CA 94111	5 clients 2 Intl.	3 staff	Private foundations Community foundations Non-Profit organizations Corporate foundations	Open Source Product Launched 09/23/10 <ul style="list-style-type: none"> Fluxx Open Source Grants Management Platform as the "Community Developed Software" "Fluxx Labs" offers consulting and technical services to address each engagement from a holistic perspective Streamline and automate critical path process flows in grants management – from initial request all the way through granting and reporting. Work collaboratively with grantmakers to understand and document organization strategy, execution, and culture – and then design and build a custom Fluxx software installation to the exact requirements of the organization. 	<ul style="list-style-type: none"> Customizable Dashboards: Every user has their own set of custom dashboards, displaying exactly what they need to see. Automated Workflows: Fluxx automates workflows and approvals with real-time alerts on each user's dashboard. Integrated CRM: Fluxx seamlessly integrates your grants information with your contacts database. Connected Data: Holistic view of requests, grants, organizations, and people Advanced Reporting: Powerful reporting features simplify creating donor statements, board review dockets, status reports - create ad hoc, custom, and canned reports. Other key modules and functionalities: Budgeting Module, Email notifications for reports, Panel Scoring, Integrated online applications and LOI management, as well as a Grantee Portal Fully multi-lingual 	<ul style="list-style-type: none"> Excel data export Auto feed to Foundation Center's eGrant Reporting via hGrant standard Integration with GuideStar, Active Directory, with the ability to push information to any feed-enabled system Planned near-term future integration with Salesforce, Exchange, as well as mobile devices, and accounting systems. 	Open source software currently can be run on the grantmaker's own servers or can be hosted in the Cloud.	Rails 3 and MySQL on the server side. jQuery on the frontend. Cross-platform and web-based. Supports Chrome, Firefox and Safari. Windows and Mac clients also available for viewing outside of web browser.

Information sources: Information shown in the table above was provided to IAA in January 2011 by each vendor / service provider, SmartSimple was added in October 2011 with data as of September 2011

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

CAMT – www.egrant.org

* Stellar Financial - www.stellarfinancial.com

* CyberGrants – www.cybergrants.com

WESTAF – www.westaf.org

PowerOFFICE – www.poweroffice.info

WizeHive - www.wizehive.com

* Vendor with significant market share invited but declined to report



This chart was updated in January 2011 with the generous support of the Grants Managers Network

<http://www.gmnetwork.org/>

10/26/2011