



Grants Management Software: How to Manage Your Existing System in the Midst of Product and Market Changes

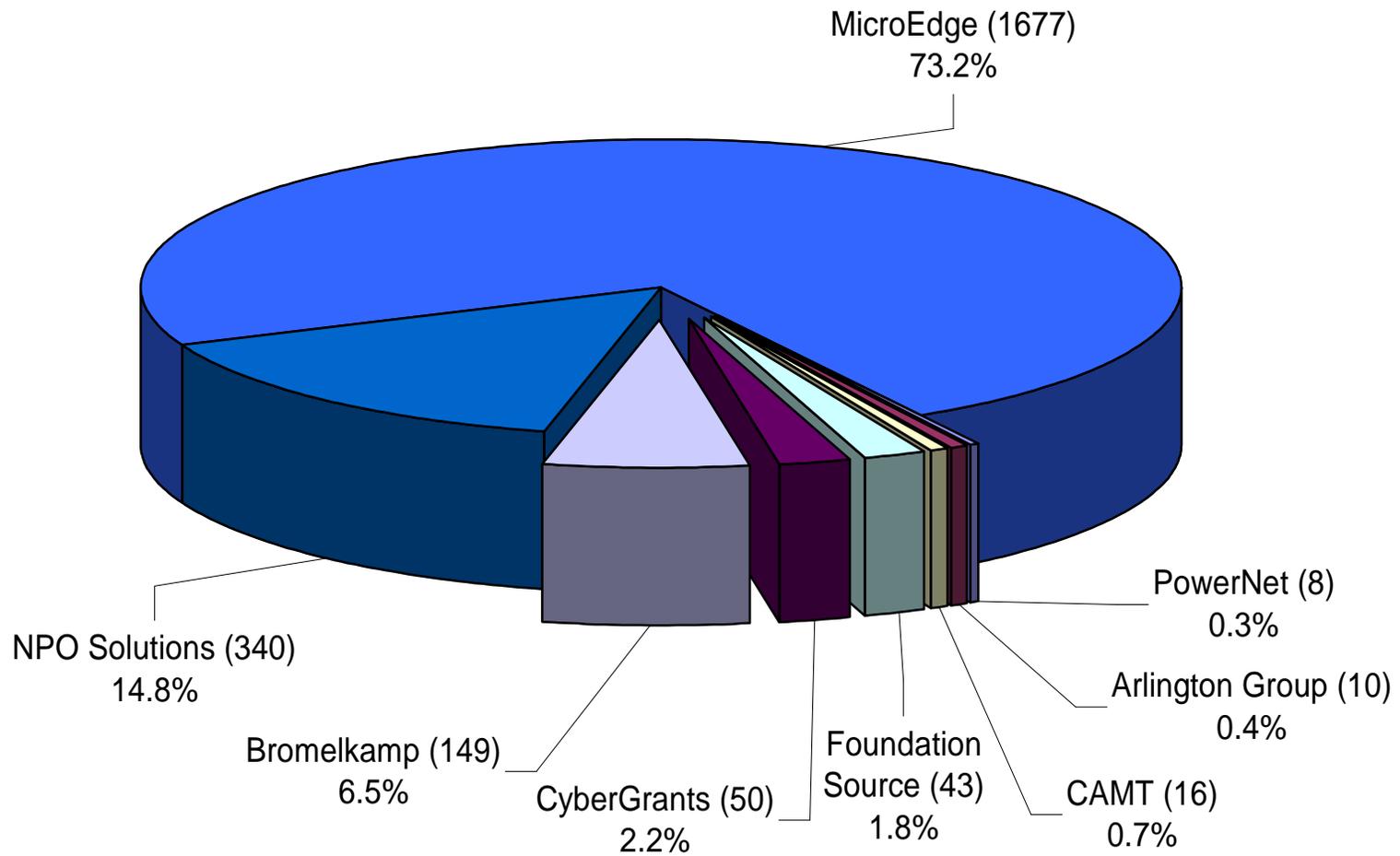
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Vendors Come and Go

2000	2003
Arlington Group	Arlington Group
Bromelkamp Company	Bromelkamp Company
CAMT	CAMT
CyberGrants	CyberGrants
Digital FootBridge	Foundation Source
Foundation Systems (not seeking new foundation clients)	NPO Solutions (Advent)
NPO Solutions	MicroEdge (Advent)
MicroEdge (Advent)	PowerNet
Orcatec	
PowerNet	

U.S. Market Commercial Grants Management Software and Services



Source: Vendor reports of active clients as of 12/31/02

A Competitor's View of MicroEdge



*"Sometimes we feel like
we're in bed
with an elephant,

but we'd still like a
corner of the blanket."*

Major Commercial Vendors and their Products

Company <small>(2000 clients / 2002 clients) *</small>	Major Products and Services 2003
Arlington Group <small>(4/10)</small>	EasyGrants, PDQueue, optional Easygrants modules
Bromelkamp Company <small>(150/150)</small>	First Pearl, Pearl, Community Pearl, eGRANT.org, FundWeb.org, and Pearl optional modules
CAMT <small>(7/16)</small>	eGRANT, eGRANTjr., optional modules
CyberGrants <small>(not reported / 50+)</small>	CyberGrants
Foundation Source <small>(none/43)</small>	Foundation Source
MicroEdge <small>(1500+/1800+)</small>	GIFTS, Essential GIFTS, MyGIFTS, IGAM, ReviewerConnect, optional modules
NPO Solutions <small>(255/350+)</small>	FIMS, FoundationPower, IGAM, Advisor Xpress, Host*Net, Safety*Net, DAF
PowerNet <small>(30/42)</small>	PowerOFFICE for Grantmakers, PowerPEOPLE

* Vendor reported number of clients using systems
in production worldwide on December 31 of each year

Market Trends in Grants Management Software and Services

- i Fewer vendors and continuing market consolidation
- i Growth in ASP hosting services to 4 percent
- i Entry of completely outsourced foundation services
- i Slow growth in the use of online grant applications
- i Fewer custom and more flexible commercial systems
- i Collaborations and partnerships
- i Future Application Programming Interfaces (API)
- i Microsoft .NET framework and Web Services emerging as next generation commercial system architecture for multiple vendors



ASP Services, Interoperability and New Development Platforms

Vendor	ASP	API	.NET and Web Services
Arlington Group	Yes (optional)	Planned for financial and CRM in 2003	.NET for Easygrants today
Bromelkamp	Yes (optional) via Windows Terminal Server or Citrix	No	No
CAMT	Optional, but no current clients	No	.NET planned
CyberGrants	Yes, all but one	No	No
Foundation Source	Yes, a full service offering for all clients	No	No
MicroEdge	No	Planned for financial and CRM in 2004	.NET and Web Services planned
NPO Solutions	Yes, optional via Citrix Server	Planned for financial and CRM in 2004	.NET and Web Services planned
PowerNet	Yes, about 30% of clients	No	No



Vendor Strategic Plans and Product Enhancements

- i Descriptions of each grants management software and service provider's strategic directions and future product enhancements are available online at:

www.iaa.com/resources/gmstrategy2003.pdf

Vendor User Groups

Vendor	User Groups	Newsletter	User Conference
Arlington Group	No	No	No
Bromelkamp	Ad-hoc regional groups	Pearls of Wisdom (general users) and Pearl Post (accounting users) published bi-monthly in alternating months	Yes
CAMT	No	No	No
CyberGrants	Planned for 2003	No	Planned for 2004
Foundation Source	No	Planned for 2Q 2003	No
MicroEdge	14 in the U.S. 1 in Canada	E-mail Client Communications Service 6+ times a year	Yes, each fall with 200+ attendees
NPO Solutions	Yes - FIMS No – FoundationPower	Yes, for both FIMS and FoundationPower users	Yes, a pre-session at the annual community foundation conference
PowerNet	No	No	No

Capabilities / Advanced Functions of the Best Grants Management Systems

- One-step mailmerge with Word and export to Excel
- Contact management with one-to-many relationships
- Synchronization with Outlook/Exchange contacts and calendar – personal or group address books
- Document management with viewers
- Built-in calendar/scheduling
- Workflow management
- Review management
- Program and grant evaluation
- Flexible ad-hoc query with saved searches
- Powerful and flexible report writers



Capabilities / Advanced Functions of the Best Grants Management Systems

- ▶ Comprehensive library of standard reports that can be modified
- ▶ User defined hierarchical coding structure
- ▶ Custom screens with user-defined fields that can be used in all reports and also permit calculations
- ▶ Web-based application forms that look just the way that you want them
- ▶ Branching eligibility quizzes
- ▶ Online submission of grantee reports with automatic virus checking of all incoming files
- ▶ Secure full-featured Web-based system access



Capabilities / Advanced Functions of the Best Grants Management Systems

- Personalized interfaces for different users
- Selected grant data can be posted on a Web site
- Application programming interface to enable two-way read/write links to other programs via an API
- Supported two-way links to accounts payable packages
- Dynamic links to GuideStar and other Web-based services
- Collaborative online budget development
- Support of both cash and accrual accounting
- Systems security and audit trails for all key events





How to Know When You Need To Upgrade or Replace Existing Systems

- i Obsolete programming language or database
- i It's unreliable, freezes, or corrupts data – but why?
- i The system isn't scalable
- i Your organization's needs have changed and the existing system is now a poor fit
- i Lack of interoperability with external applications, databases or services
- i A new product, module or service provides substantially more functionality and the cost/benefit supports an upgrade or a migration



How to Know When You Need To Upgrade or Replace Existing Systems

- i Poor vendor support
- i Lack of R&D investment in the product
- i The vendor is losing market share, has high staff turnover, is in financial trouble, or is out of business.



Common Pitfalls and Mistakes

- i Insufficient grant administrator and user training
- i Not being flexible and taking full advantage of your system's existing capabilities
- i Not upgrading to the latest version of the software
- i Blaming the grants management software for problems caused by other programs, viruses, and data communications
- i Poorly designed coding structure that prevents queries and reports
- i Not establishing and enforcing standards for data entry and coding



Common Pitfalls and Mistakes

- i Islands of incomplete and duplicate information
- i No integration of proposals, grants, contacts, reviews and all associated documents
- i Not making the system easy for everybody to use
- i Not joining and becoming active in a user group
- i Not visiting other similar foundations to learn how they manage their workflow and use their systems
- i Trying to build your own system
- i Hiring developers who have little or no experience designing full-featured grants management systems





How to get the most out of
the system that you have !