Trends in Grants Management Systems

April 21, 2016

Technology Affinity Group
Promoting technology in philanthropy

idealware

Introductions…

idealware

Helping Nonprofits Make Smart Software Decisions

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- Managing Constituents
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- Collaboration
- Fundraising
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- Back Office & Operations
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Featured Training

March 18, 2010 - 4:00pm - 5:30pm
Getting Started with Mobile Outreach
It's easier that you might think to broadcast text messages to your...

March 25, 2010 - 4:00pm - 5:30pm
Getting Started with Email Fundraising
How do you design and write an email campaign that will work? What tools...

April 1, 2010 - 4:00pm - 5:30pm
Getting Started with Online Conferencing

Latest Articles & Reports

Using Social Media to Meet Nonprofit Goals: The Results of a Survey
March 2010

Adventures in Executive Dashboards
By Kaitlin LaCasse, February 2010

Field Guide to Software for Nonprofits: Fundraising, Communications, and Outreach
January 2010

Is Email Old News? Social Networks as

From the Blog

Building Websites for a Mobile Phone
By Laura Quinn

New report: Using Social Media to Meet Nonprofit Goals
By Laura Quinn

New Faces, Blog Changes
By Peter Campbell

Three Great Nonprofit Resource Opportunities
By Debra Askanase

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Introductions

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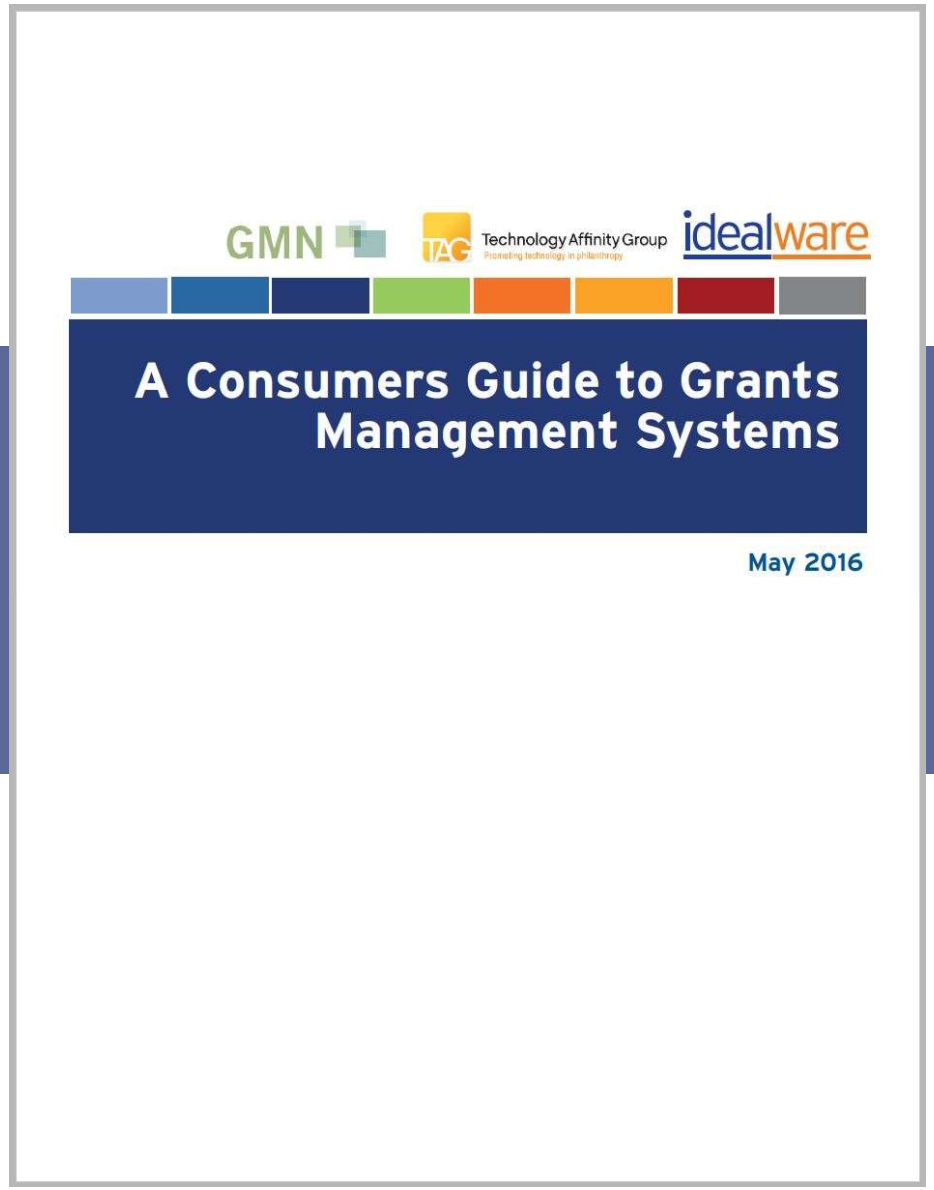
What We'll Cover

- Where Did this Information Come From?
- A Look at the Market
- New Systems This Time Around
- Deciding Factors Remain the Same
- Some Feature Trends in 2016

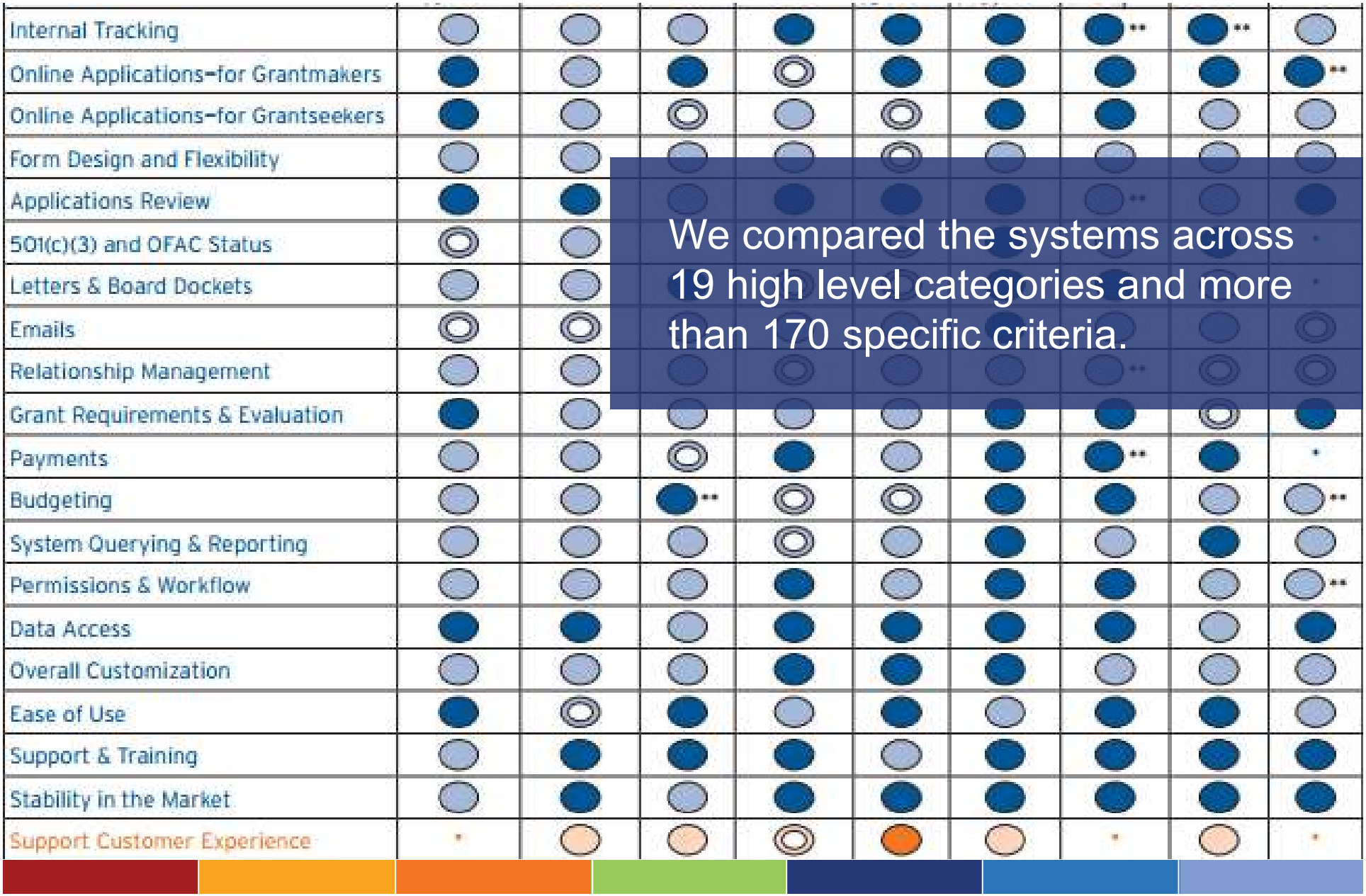
Where Did This Information Come From?

The Consumers Guide

We reviewed 30 full grants management systems for private foundations in our 2016 update, to be released in early May.



Detailed Reviews



We compared the systems across 19 high level categories and more than 170 specific criteria.

Systems Reviewed

In both 2013 and 2016

- Altum Easygrants
- Altum proposalCENTRAL
- Bromelkamp First Akoya.net
- Bromelkamp First Pearl
- Closerware Grantmaker
- Dulles Technology Partners WebGrants
- Foundant Grant Lifecycle Manager
- FusionLabs Granted GE/Spectrum
- Good Done Great Grant Management System
- FluidReview
- JK Group EasyMatch
- MicroEdge GIFTS Online
- foundationConnect, by roundCorner
- Common Grant Application
- Altum PhilanTrack
- SmartSimple GMS360°
- Fluxx
- WESTAF GrantsOnline
- WizeHive Grant Manager
- ZoomGrants
- CyberGrants
- DonationXchange

Systems Reviewed

New for 2016	Not included for 2016
• GivingData • Smalldog, by Smalldog Net Solutions • Zengine (from WizeHive)	• GrantStream GrantRight (now Grants by Benevity) • MicroEdge GIFTS • MicroEdge GIFTS Alta

A Look at the Market

A Lot Of External Investment in the GM Market

- Blackbaud acquired MicroEdge
- Continued venture capital investment into Fluxx
- SurveyMonkey acquired FluidReview
- Waud Capital invested in CyberGrants
- roundCorner acquired foundationConnect

And Movement Inside the Space

- Altum acquired PhilanTech
- Benevity acquired GrantStream
- JK Group and WizeHive developing new tools
- GivingData launches as standalone GM system

Growth in Market Overall

Clients Across Systems	
2013 Report	**2016 Report**
3573	5413

Growth in Customer Base

Client	2013 Clients	2016 Clients
Foundant	**514**	**902**
WizeHive	750	750
Gifts Online	**300**	**720**
Fluid Review	**350**	**600**
DonationXchange	**230**	**430**
CyberGrants	300	300
First Pearl	220	220
Zengine	**0**	**200**
Fluxx	**53**	**200**

Foundant went to #1 in market share

Several others also had significant growth

Growth in Customer Base

Client	2013 Clients	2016 Clients
Granted GE Spectrum	120	150
GoodDoneGreat	141	141
Altum proposalCENTRAL	75	98
foundationConnect	63	90
SmartSimple	40	67
PhilanTrack	40	50
Easygrants	21	17

FluidReview Has Almost Doubled Client list

FluidReview | Idealware Demo | 0 | English

Manage Grants

Add

Download | Delete | Duplicate | Import | Bulk Apply | (8) Columns | Edit Categories | Actions | Macros

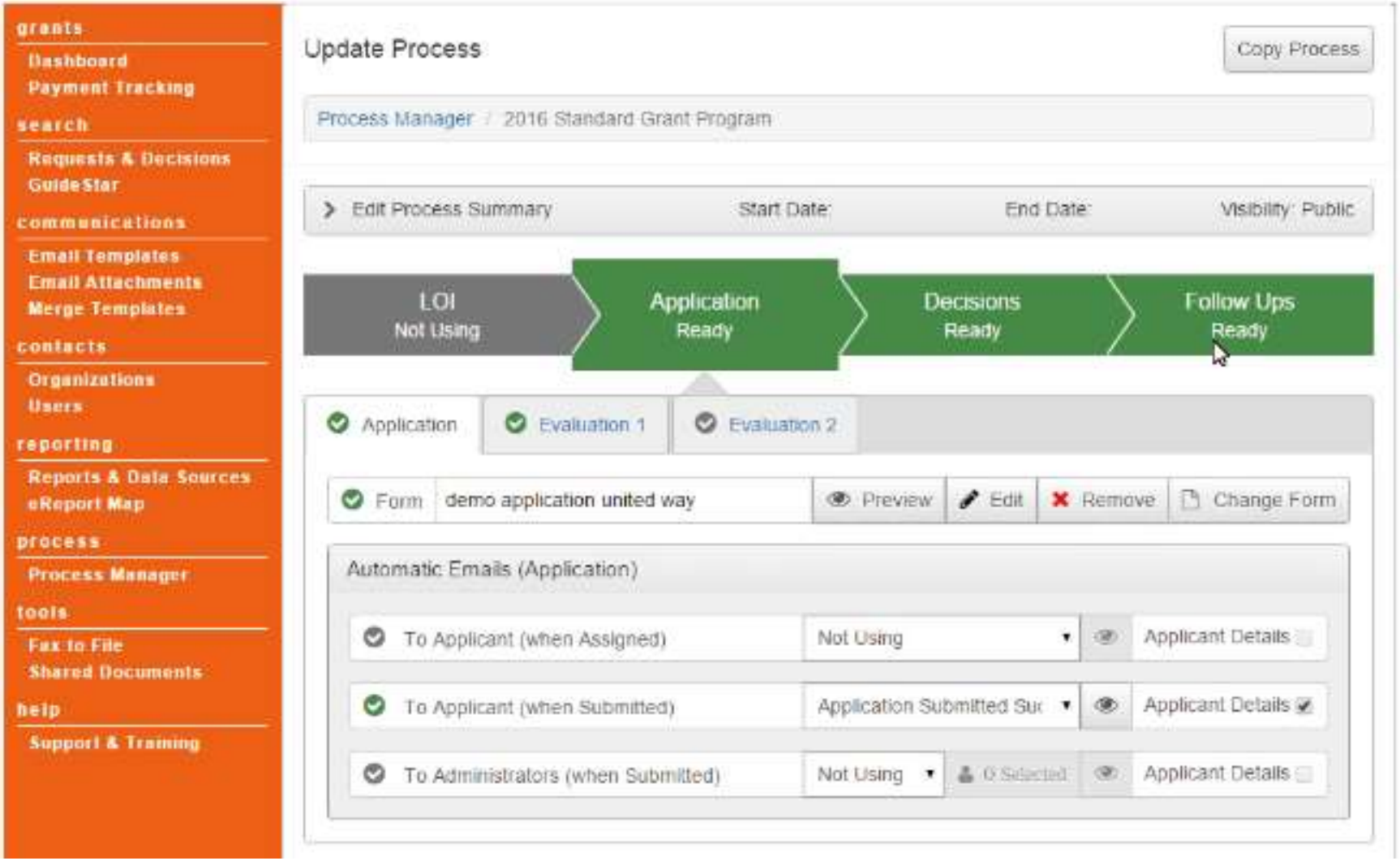
		Grant	Publicity	Open Date	Deadline	Current Fiscal Year Balance	Applications (Submitted)	Applic Subm
	OPEN	Sample Grant 1	Public	Jan 1	Dec 31	$0.00	1	0
	OPEN	Sample Grant 2	Public	Jan 1, 2016	Sep 30, 2016	$0.00	0	0

1 - 2 of 2

25 | 50 | 100 | 250

Quick Filters:

Foundant Almost Doubled Client List



Considerable Development Since 2013

- MicroEdge GIFTS Online
- Altum PhilanTrack
- Bromelkamp First Akoya.net
- Dulles Technology Partners WebGrants
- foundationConnect, by roundCorner
- SmartSimple GMS360°

Solid In Their Niche

- Altum Easygrants
- Altum proposalCENTRAL
- Bromelkamp First Pearl
- CyberGrants
- WESTAF GrantsOnline
- Versaic Grants

What’s on your short list?

If you need strong application review…

- Altum Easygrants
- First Akoya.net
- FluidReview
- Fluxx
- SmartSimple GMS360°

If you need flexible relationship management…

- Bromelkamp First Akoya.net
- Fluxx
- foundationConnect, by roundCorner
- SmartSimple GMS360°

If you need dedicated support for grantee evaluation…

- Bromelkamp First Akoya.net
- GivingData
- Fluxx
- MicroEdge GIFTS Online
- MOSAIC GEMS

If you have other specific concerns…

Community Foundations:

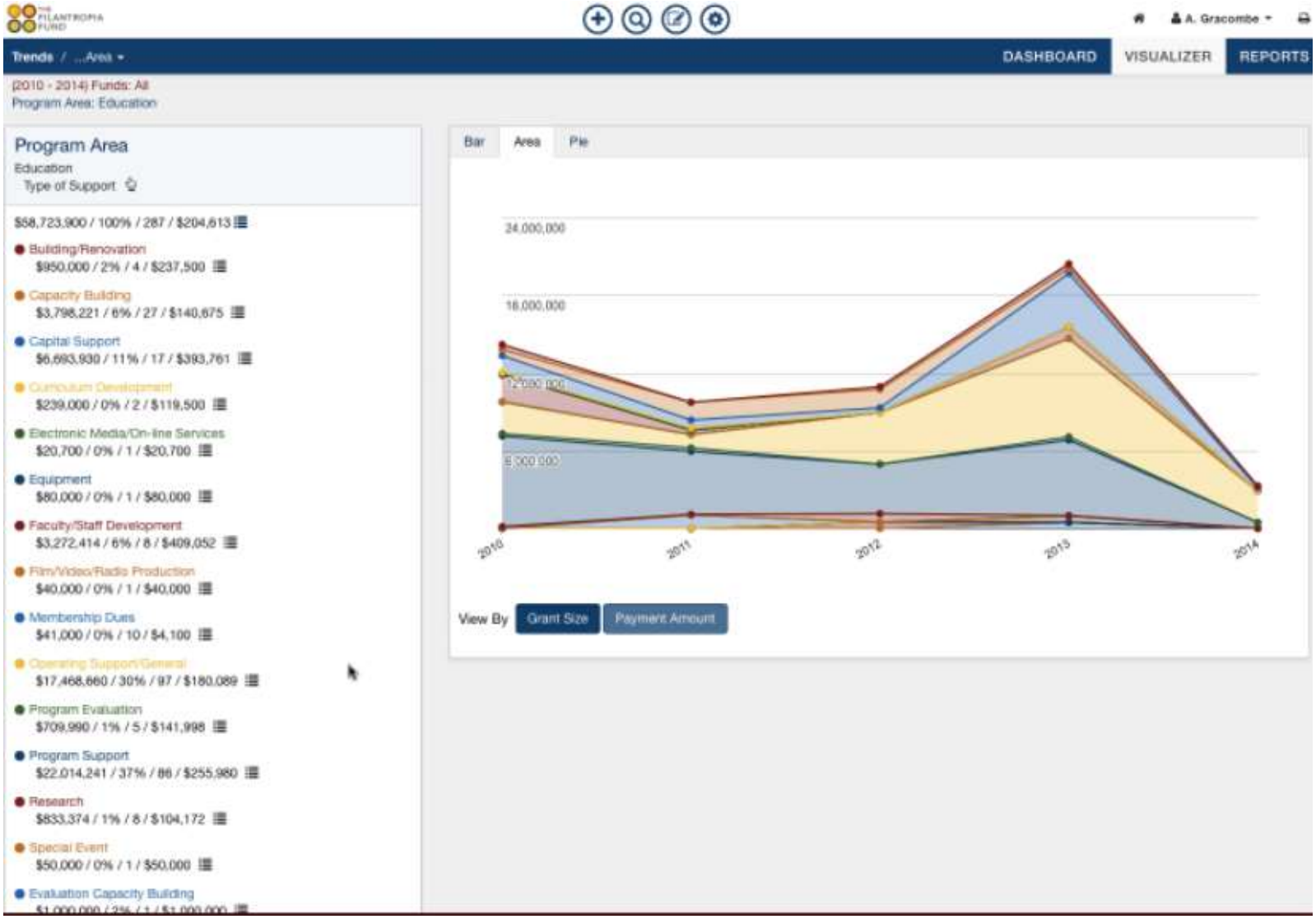
- Bromelkamp's Community Pearl and Community Akoya.net
- Granted GE/Spectrum, from FusionLabs
- Smalldog

Corporate Philanthropy or Corporate Social Responsibility (CSR):

- Cybergrants
- Good Done Great
- JK Group's EasyMatch
- Versaic Grants

New Systems in this Report

GivingData


A. Grascombe
Trends / ...Area
DASHBOARD
VISUALIZER
REPORTS
(2010 - 2014) Funds: All
Program Area: Education
Program Area
Education
Type of Support
$58,723,900 / 100% / 287 / $204,613
Building/Renovation
$950,000 / 2% / 4 / $237,500
Capacity Building
$3,798,221 / 6% / 27 / $140,675
Capital Support
$6,693,930 / 11% / 17 / $393,761
Curriculum Development
$239,000 / 0% / 2 / $119,500
Electronic Media/On-line Services
$20,700 / 0% / 1 / $20,700
Equipment
$80,000 / 0% / 1 / $80,000
Faculty/Staff Development
$3,272,414 / 6% / 8 / $409,052
Film/Video/Radio Production
$40,000 / 0% / 1 / $40,000
Membership Dues
$41,000 / 0% / 10 / $4,100
Operating Support/General
$17,468,660 / 30% / 97 / $180,089
Program Evaluation
$709,990 / 1% / 5 / $141,998
Program Support
$22,014,241 / 37% / 86 / $255,980
Research
$833,374 / 1% / 8 / $104,172
Special Event
$50,000 / 0% / 1 / $50,000
Evaluation Capacity Building
Bar
Area
Pie
24,000,000
16,000,000
2010
2011
2012
2013
2014
View By
Grant Size
Payment Amount

Zengine by WizeHive

Idealware Grant Demo ▾ | Marketplace | zengine

Applications | Reviews | Awards | Payments | More ▾ | + Add Form

+Add Review | View: Review by Application ▾ | The view has changed. Save view or save as new view. | Comments | Search | Form Tools

Grouped by: Application

Application	Category Rele...	Planning Score	Mission Align...	Budget Score	Score	Comments	Reviewer
After school activities to keep children active - SAAS - Stay Active After School (3)							
After school activities to keep children active - SAAS - Sta	4	3	4	3	14		Hirsch , Natalie
After school activities to keep children active - SAAS - Sta	4	4	3	2	13		Griffith , Christopher
After school activities to keep children active - SAAS - Sta	4	4	4	4	16		Levinson , Michael
Coastal cleanup and environmental protection - Delaware Coast Foundation (3)							
Coastal cleanup and environmental protection - Delawa	1	1	2	3	7	Does not seem like a good fit	Levinson , Michael
Coastal cleanup and environmental protection - Delawa	1	1	1	2	5	Good idea, but does not fit Zen Foundation'...	Griffith , Christopher
Coastal cleanup and environmental protection - Delawa	1	1	1	3	6	Feel good about this.	Hirsch , Natalie
Community leadership development - New World Leaders (3)							
Community leadership development - New World Leade	3	4	3	2	12		Hirsch , Natalie
Community leadership development - New World Leade	3	3	4	2	12		Griffith , Christopher
Community leadership development - New World Leade	4	4	4	4	16		Levinson , Michael
Nutrition Starts Now - Healthy Kids Tomorrow (3)							
Nutrition Starts Now - Healthy Kids Tomorrow	2	4	3	4	13	We know that well nourished children leads ...	Griffith , Christopher
Nutrition Starts Now - Healthy Kids Tomorrow	2	4	2	4	12	I don't believe it fits as closely as some of th...	Hirsch , Natalie
Nutrition Starts Now - Healthy Kids Tomorrow	3	4	2	4	13	Yum! I would love this program for my child...	Levinson , Michael
Underage drinking prevention - Youth Against Drunk Driving (3)							
Underage drinking prevention - Youth Against Drunk Dri	4	4	4	2	14		Hirsch , Natalie
Underage drinking prevention - Youth Against Drunk Dri	3	4	4	3	14		Griffith , Christopher
Underage drinking prevention - Youth Against Drunk Dri	4	3	3	4	14		Levinson , Michael
Youth Development Program - Conshohocken Delinquency Prevention Program (4)							
Youth Development Program - Conshohocken Delinque	4	3	3	2	12		Levinson , Michael
Youth Development Program - Conshohocken Delinque	4	3	4	4	15		Griffith , Christopher
Youth Development Program - Conshohocken Delinque	4	3	3	3	13		Hirsch , Natalie
Youth Development Program - Conshohocken Delinque	5	4	4	5	18	This seems like a great program to fund. Th...	Hirsch , Natalie

SmallDog

Smalldog FOUNDATIONS

HOME TASKS DONATIONS GRANTS ACCOUNTS FUNDS FINANCIALS LOGOUT

Jump: Super Search

Grants

- Help
- Add Task
- Print Page
- Reports
- Create
- Post All
- Grant Cycles
- Request Notify
- Void Unfunded
- Import
- Permission

Grant Buckets | Request (4) | Catalog | Import | New (34) | Approval (15) | Voucher (5) | Paid (1264) | Complete

Your Grant Catalog URL is: https://test.smalldognet.com/erp/donate/list/grant

Grants

ID	Grant Date	Grantee	Fund	Amount	Funded	Balance	Descriptio
2354	08/24/2015	University of Washington	Jeanne Delong Memorial Fund (PR) :: Other Fund	1,166.67	1,166.67	0.00	Art Scholar
2333	04/27/2015	Jack Russell Institute	Tucker Belles Fund (U-DAF) :: DAF	1,000.00	1,000.00	0.00	flea control
2329	04/22/2015	Whatcom Community Foundation	Operations (U) :: Smalldog Operations	1,000.00	1,000.00	0.00	operations
2328	04/22/2015	Whatcom Community Foundation	Operations (U) :: Smalldog Operations	1,000.00	1,000.00	0.00	program su
2359	11/01/2015	Cornell University	Balto Memorial Fund (PR-DAF) :: DAF	500.00	500.00	0.00	Balto Mem
2316	02/10/2015	Orcas 4-H	Chris Sutton OIHS Scholarship Fund (U-DAF) :: DAF	500.00	500.00	0.00	fdsjklfjsdklf
2340	06/15/2015	San Juan County Dog Parks Fund (TR) :: Playground Fund	Do Good Fund (U-DAF) :: DAF	500.00	500.00	0.00	Anonymous
2312	02/05/2015	San Juan County Dog Parks Fund (TR) :: Playground Fund	James Long Endowment (PR) :: Other Fund	500.00	500.00	0.00	fdsfds
2330	04/22/2015	Whatcom Community Foundation	William J. Kent Fund for Orcas Families (U-DAF) :: DAF	500.00	500.00	0.00	operations
2362	10/27/2015	Family Connections	Chris Sutton OIHS Scholarship Fund (U-DAF) :: DAF	400.00	400.00	0.00	fdsjklfdjslk
Need Additional Funding							
2247	03/11/2014	Arts Alive!	PIP Partners in Philanthropy (TR) :: Other Fund	800.00		800.00	Theater Gr
2260	05/01/2016	Friends of Moran State Park	PIP Partners in Philanthropy (TR) :: Other Fund	15,500.00		15,500.00	Equipment
2326	04/14/2015	Fur & Feathers 4-H	William J. Kent Fund for Orcas Families (U-DAF) :: DAF	50,000.00		50,000.00	fdsfdsfds

Deciding Factors Remain the Same

Online Data Collection

Will staff be able to easily see the data? Report on it?

Will it support a multi-stage proposal process?

How easy is it for the applicant to use?

While most systems claim to support online data collection, actual functionality varies widely.

Multiple User Roles

Not all systems easily support wide usage by the whole organization, although this is changing.

Grants Managers

Robust access and support for advanced functionality

Program Staff

Easy viewing and editing of info that's of interest to them

Board & Reviewers

Easy access to review and comment

Grantees

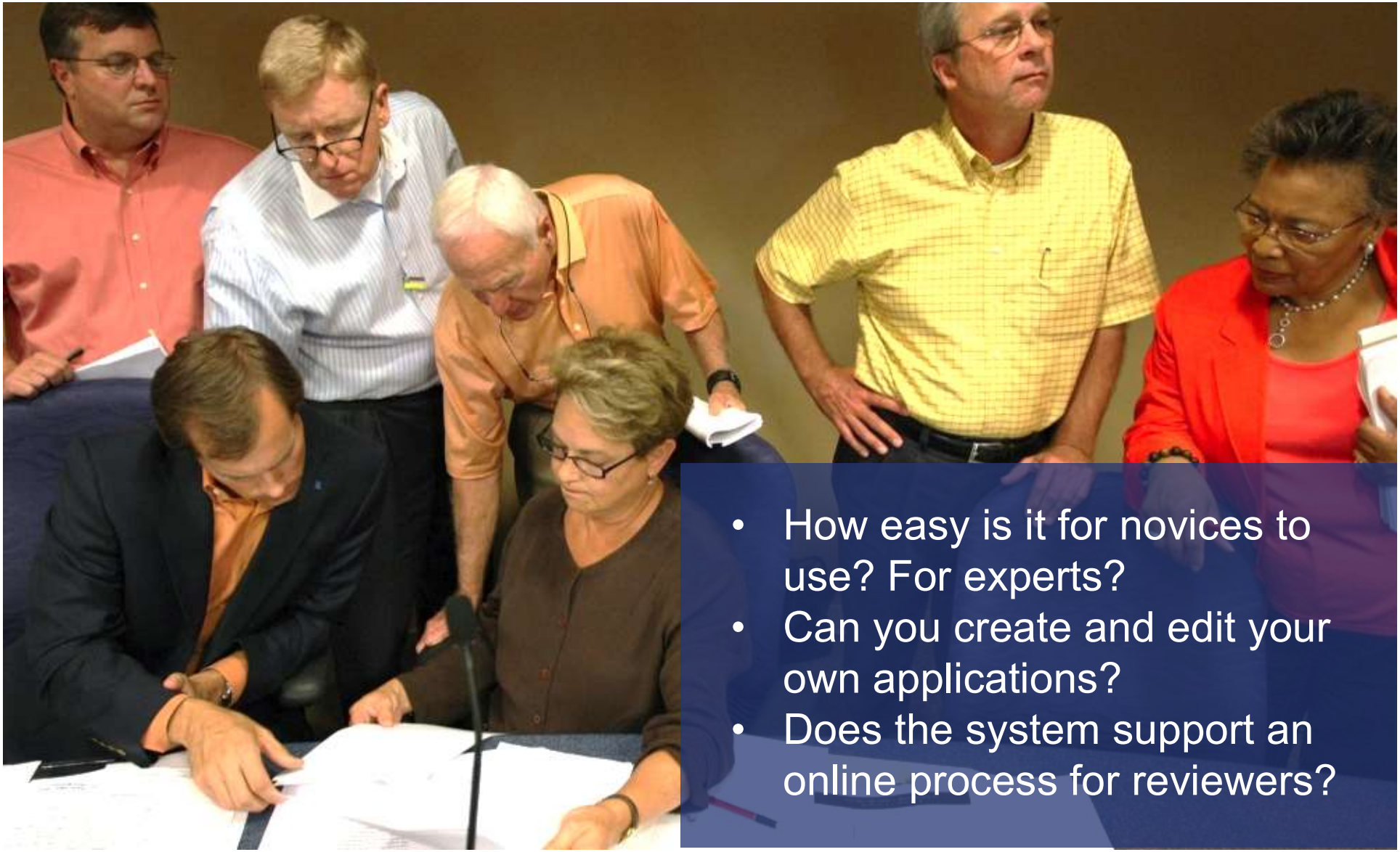
View status and submit info

Customization

- Can you add custom fields? Delete them?
- Can you tailor reports? Workflows?
- Can you create custom functionality?
- How much customization can you do yourself, and what can only the vendor do?

Customization can help if you have (actually) unique needs…
but you'll pay for it.

Ease of Use



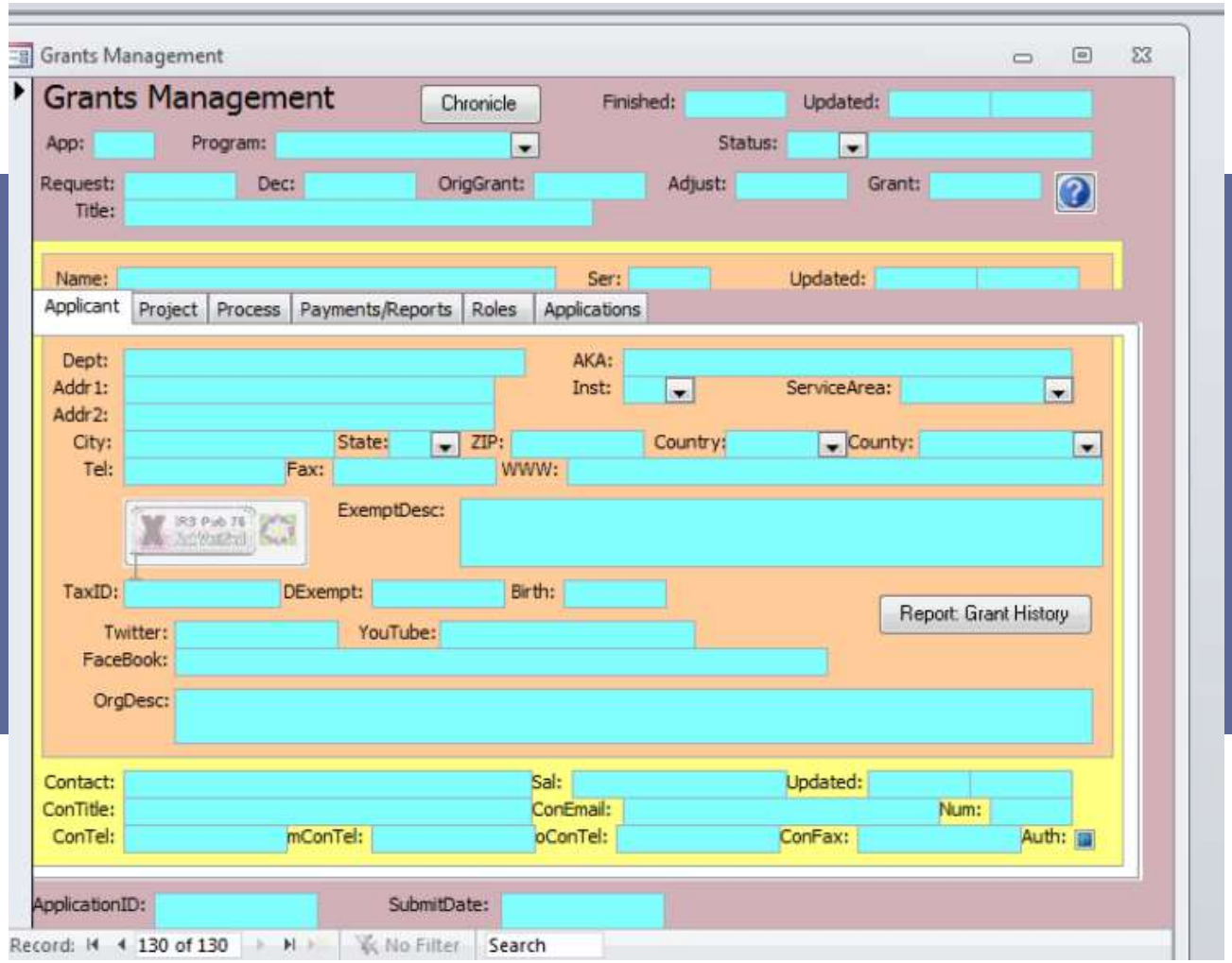
- How easy is it for novices to use? For experts?
- Can you create and edit your own applications?
- Does the system support an online process for reviewers?

Some Trends in 2016

Continued Push to Hosted Systems

Few installed systems remain.

Bromelkamp's First Pearl is one of the last.



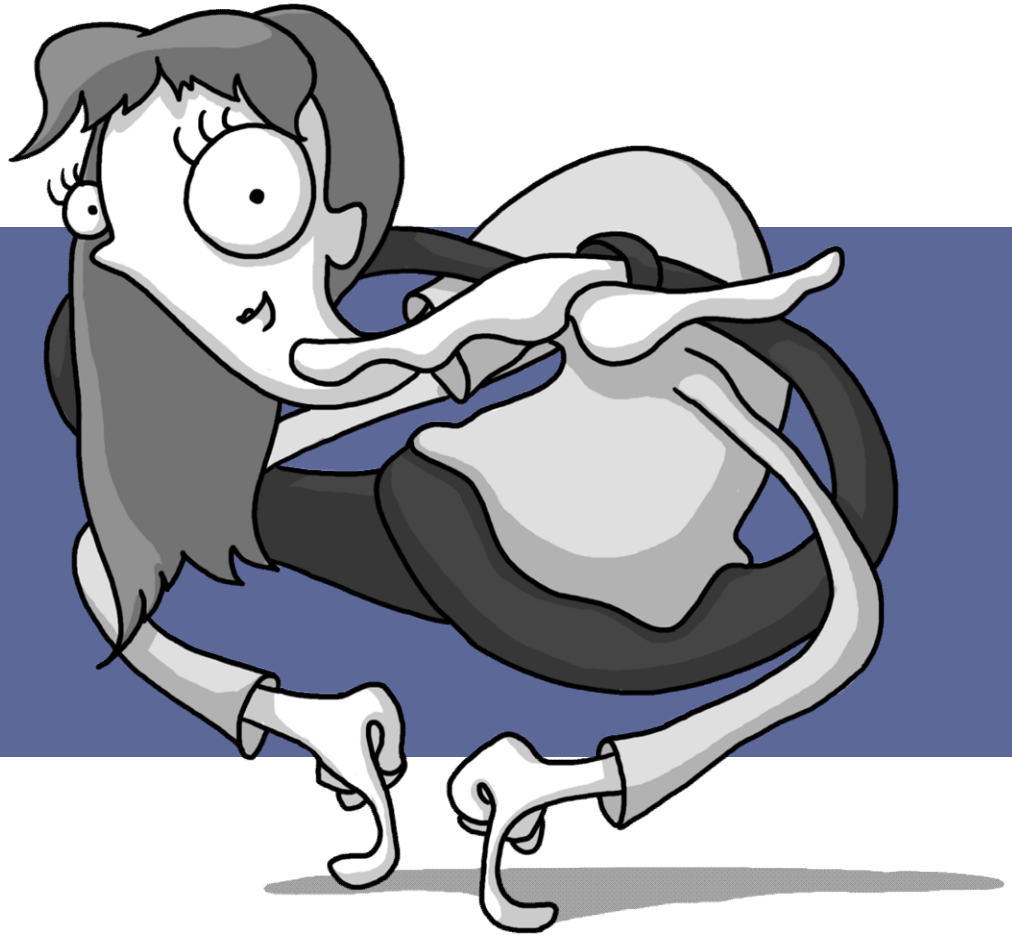
Bromelkamp First Pearl

Possible Movement Towards CSR

- Good Done Great is now focusing solely on corporate philanthropy.
- JK Group, CyberGrants and DonationXChange are all doubling-down on corporate philanthropy.
- With rumors and rumblings from others.

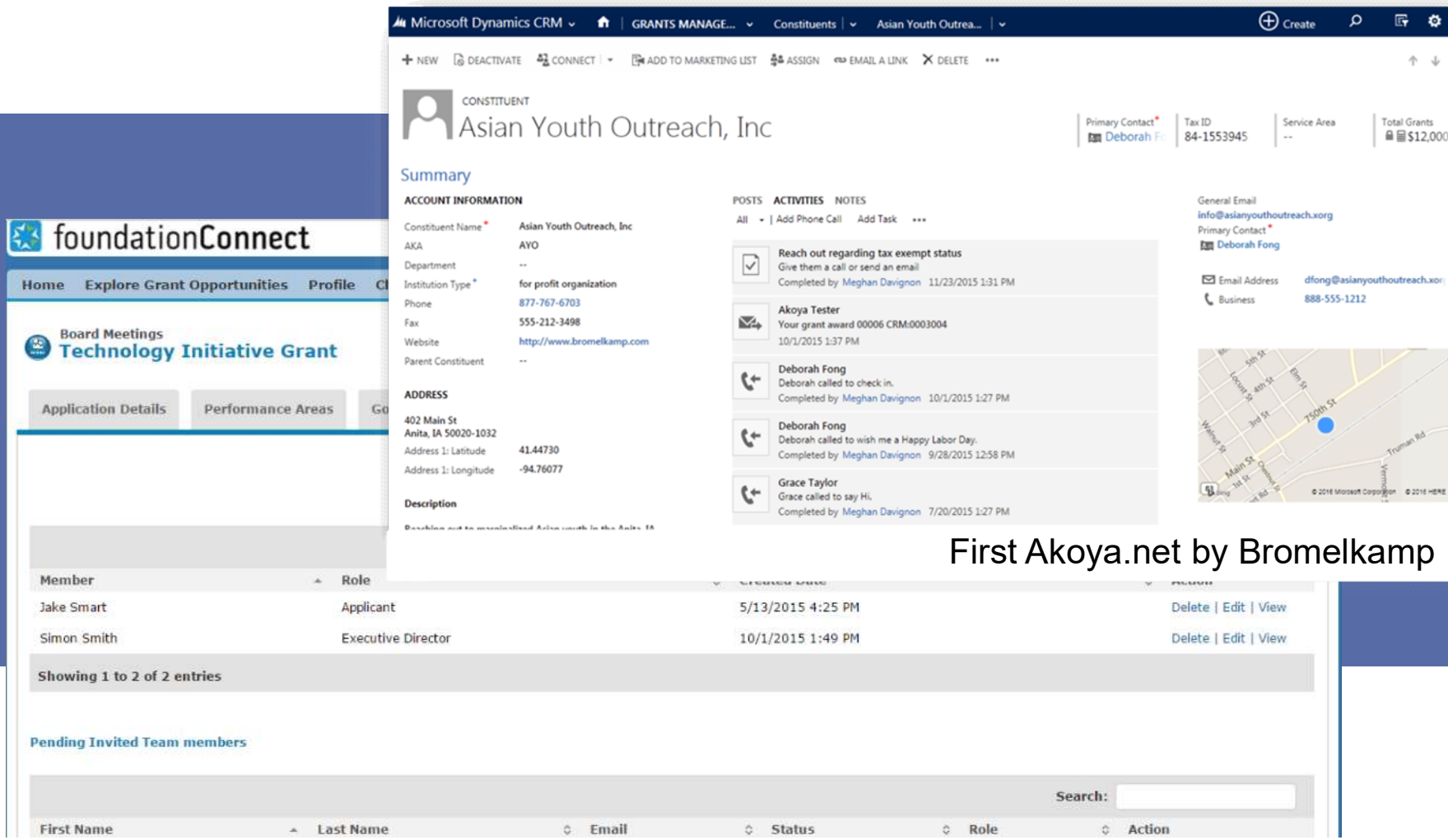
Growth in Flexible Platforms

- Salesforce platforms
- Fluxx builds extensively on its platform
- New platform in Zengine (by WizeHive)



It’s very unlikely that you should build from scratch.

Considering CRMs



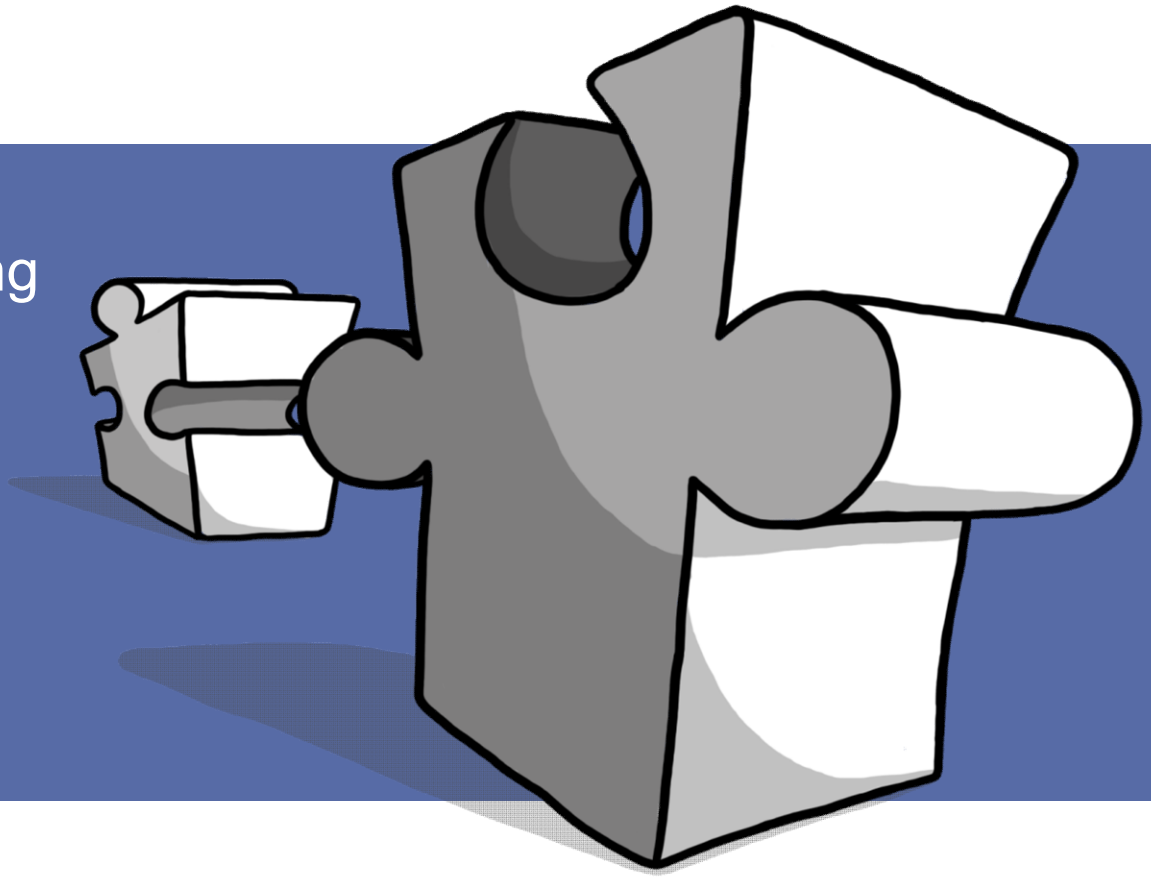
First Akoya.net by Bromelkamp

foundationConnect, by roundCorner

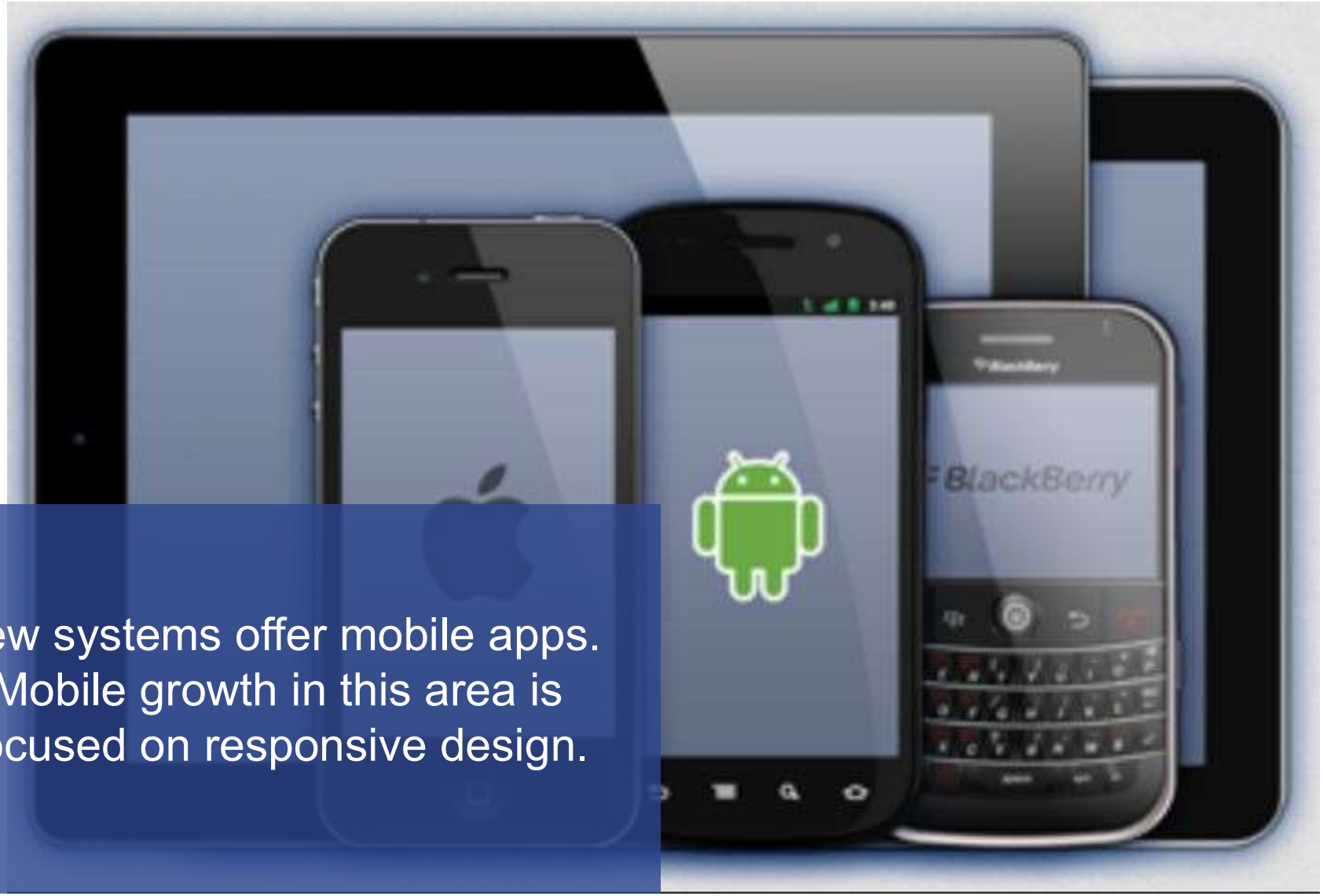
Integration with Other Systems

Vendors are more building out more and are more willing to talk about integration

- Accounting systems
- Broadcast email
- Donor Management



Continued Support for Mobile Access

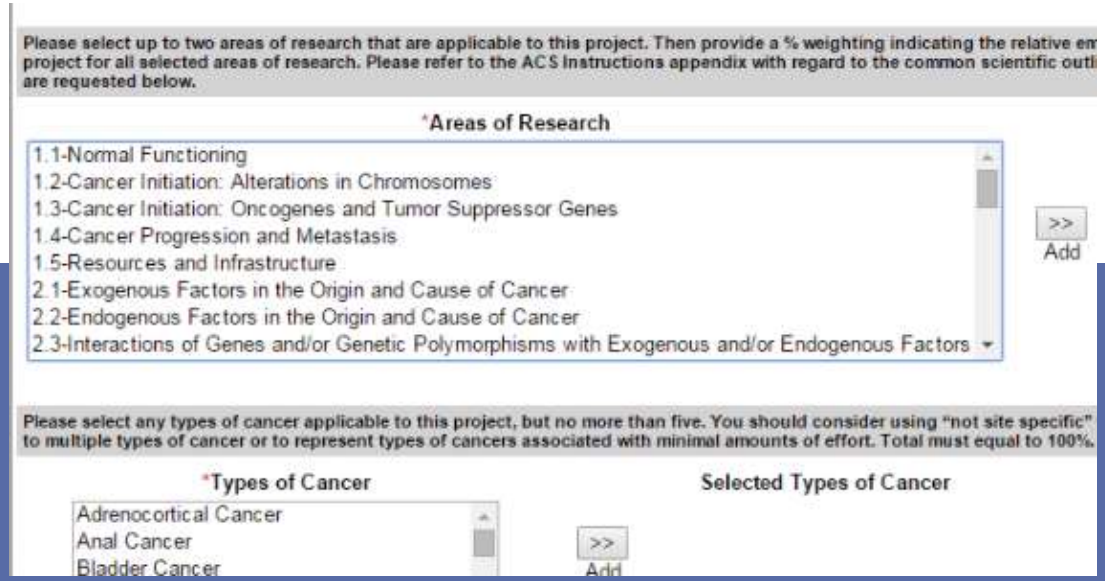


Few systems offer mobile apps. Mobile growth in this area is focused on responsive design.

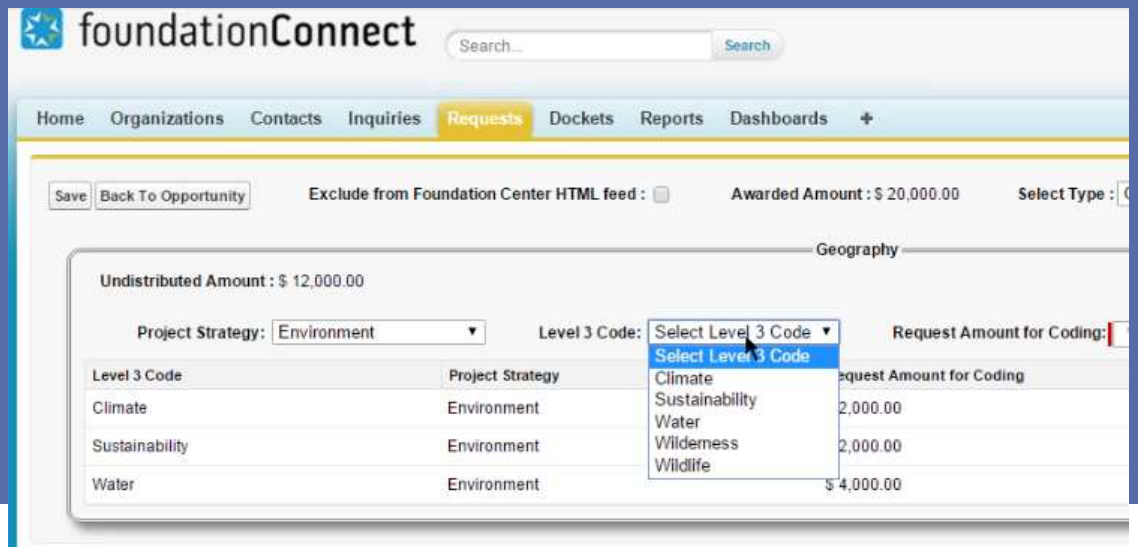
Taxonomies

Some movement towards taxonomy support, including standards like NTEE and eGrant

Growing support for hGrant and Project Simplify

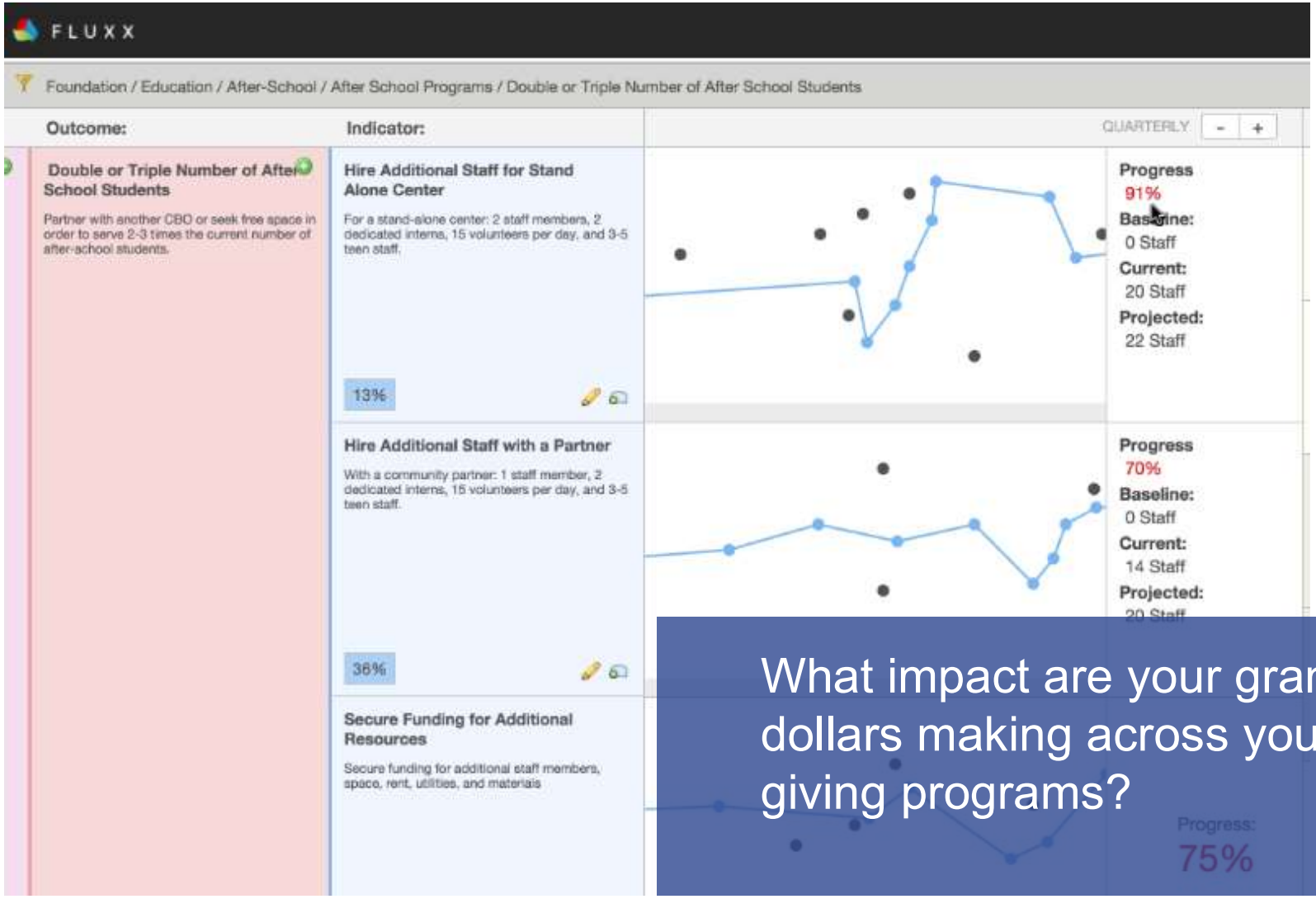


Altum proposalCENTRAL



foundationConnect, by roundCorner

Huge Growth in Outcomes Tracking

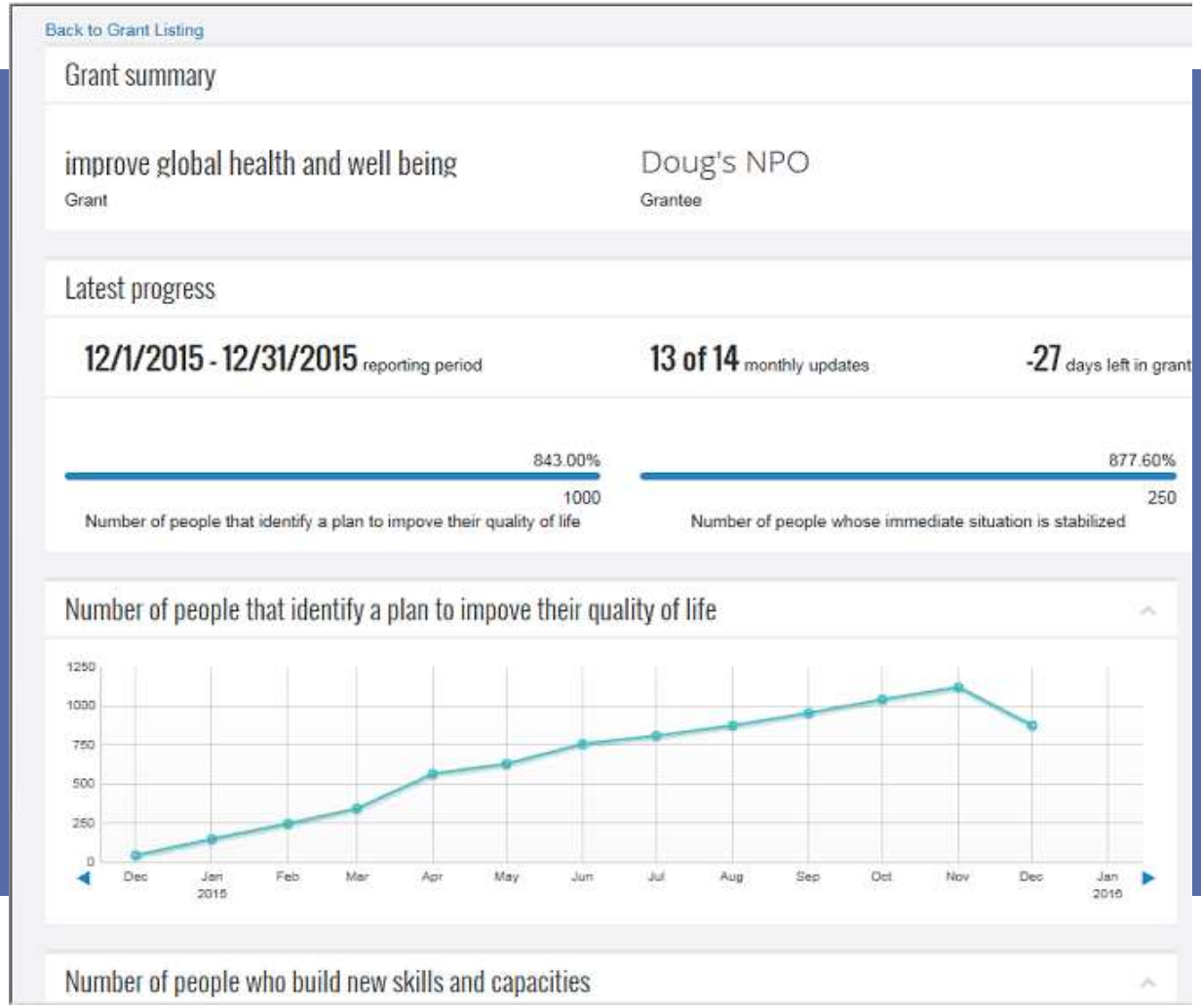


What impact are your grant dollars making across your giving programs?

Fluxx

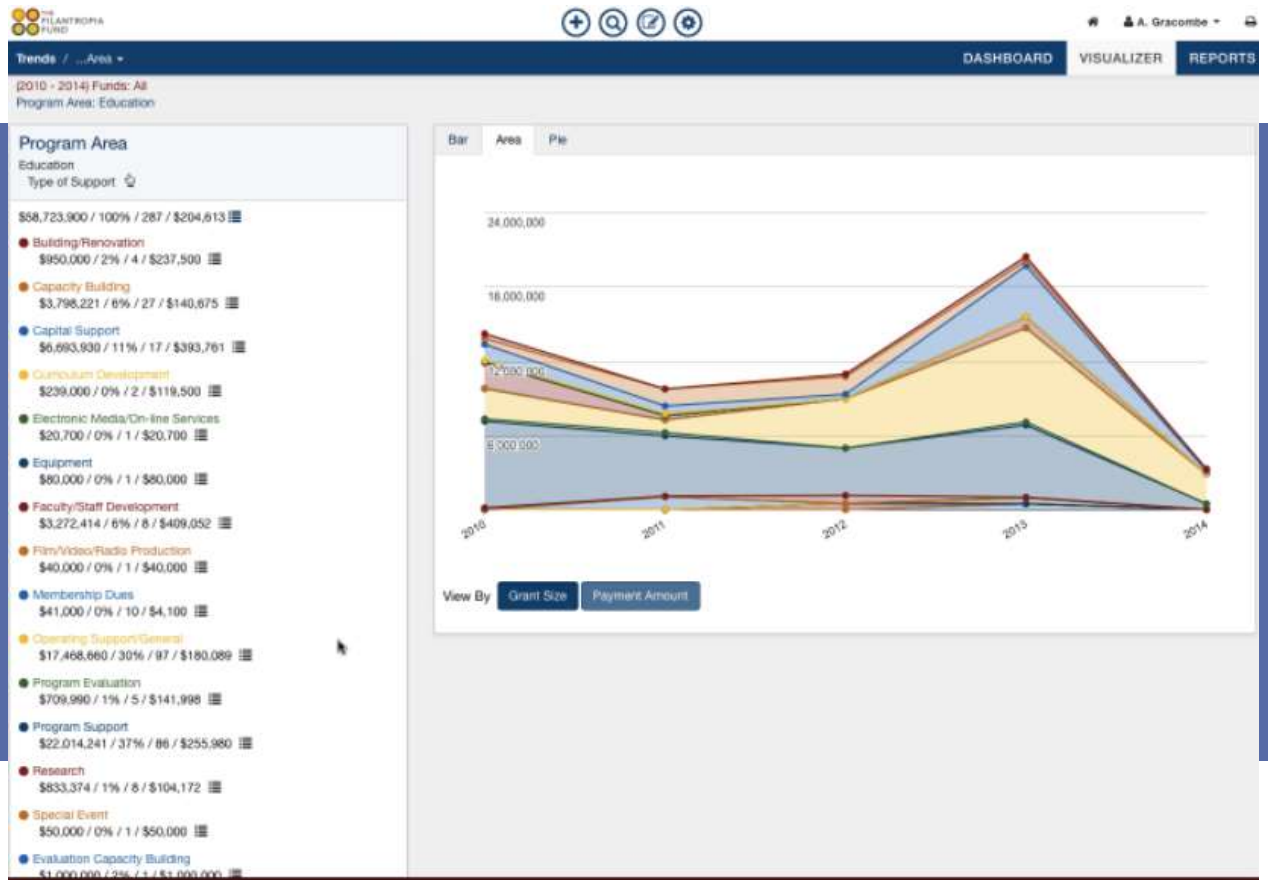
Investments in Outcome Tracking

- GIFTS Online, Fluxx, First Akoya.net add new modules
- GivingData heavily-focused on outcomes
- GEMS continues to provide dedicated outcomes support



MicroEdge GIFTS Online

Not Much Movement in Dashboards

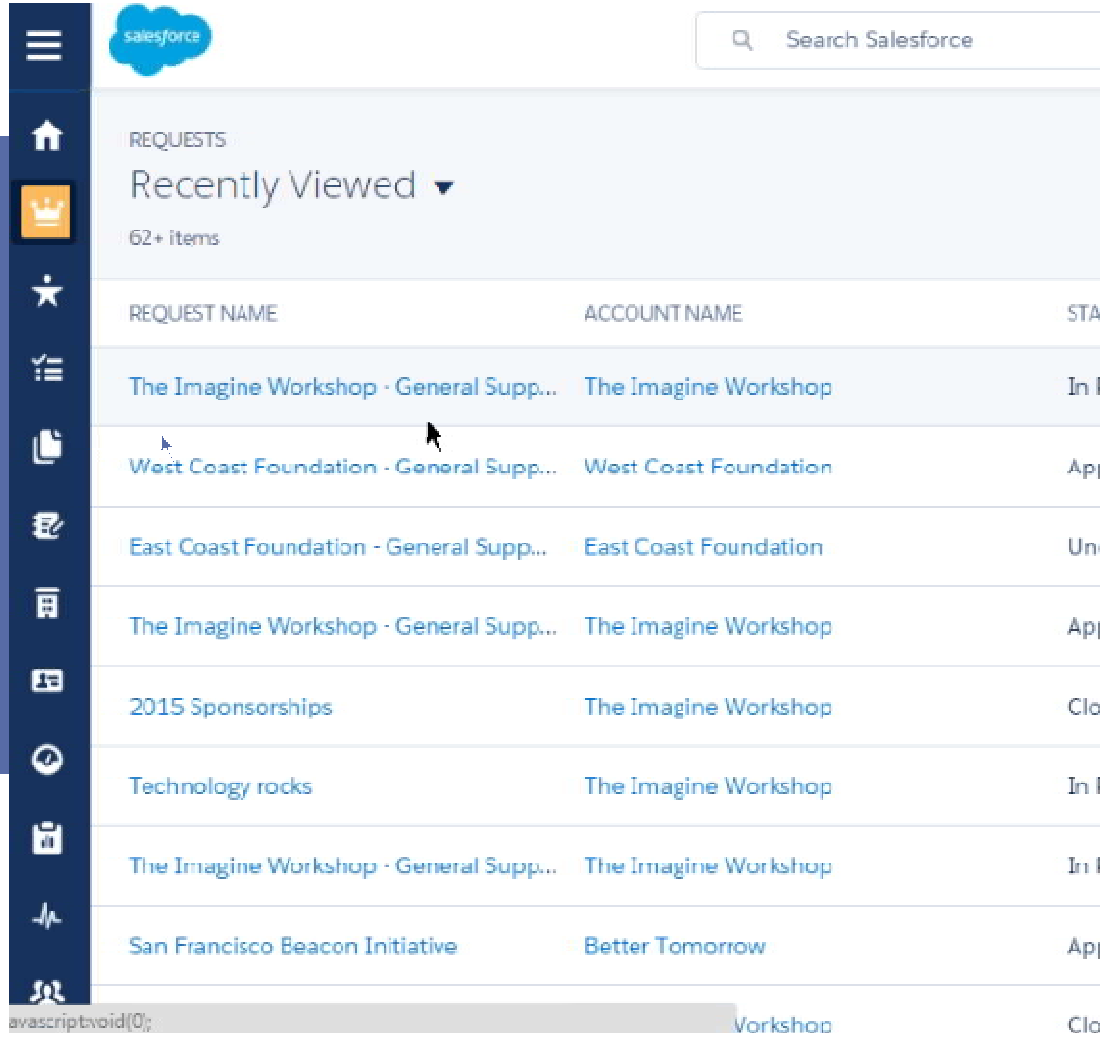


Those with dashboards still have them, but surprisingly little movement in this area.

Easier to Use

Trend toward ease of use:

- User-friendly views
- Portals
- Catering to the casual user
- Greater emphasis on workflow management



foundationConnect, by roundCorner

Questions?