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Grants Management Software Interview Analysis Report

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Executive Summary

For many foundations and other grant-making organizations, grants management software provides indispensable functionality to help track and make sense of a very complex process. Throughout the grant-making lifecycle – from collecting and tracking grant applications, to managing the grant review process, communicating with grantees, collecting grant reports and outcomes information, reporting, accounting, budgeting, and more – a good grants management system can save organizations time, help make processes effective and transparent, and even transform the way they do business.

"I couldn't imagine living without grants management software."

On the other hand, a bad or poorly suited grants management system can cost more time and money than it saves. As one foundation staff person said, "The amount of time we waste on this database is just incredible." But what defines a robust, effective grants management system?

Some of these characteristics of course vary from one organization to another. But there's a surprising degree of agreement on what is needed from this type of system. In this report, we summarize the results of 25 interviews with staff members at grant-making organizations and the consultants who work with them, as to what functionalities and characteristics are important to support foundations' grants management needs.

We gathered a huge amount of data about the details of desired grants management functionality. This report provides all those details about what the interviewees wanted and expected from a grant application system. But across the interviews, a few themes emerged:

- **The importance of the nuts and bolts.** While interviewees were interested in cutting-edge functionalities, their core needs revolved around basic processes. The ability to easily merge grantee information into printed letters was critical, as was the ability to track what they have received and needed from grantees, to create useful dockets for board review, and to generate needed financial and other reports.

- **Online support**. For almost every stage in the process – and particularly for grant applications, review, and the collection of reports from grantees – the ability to collect and view information online was critical to a large number of those interviewed. Online support allows staff members or grantees to work from anywhere, to have easy access to find grant information, and also greatly reduces the amount of data entry that a foundation needs to do.

- **Workflow and notifications.** Throughout the grant-making process, a number of interviewees expressed an interest in a system that would help their staff understand what had to be done when – for instance, by providing a dashboard-like view on which each individual should focus, or automatic ticklers about upcoming deadlines.

- **Customization.** The ability to customize a system – particularly, to be able to tailor the reports, the review process, and the application questions – was a key recurring need. Many foundations have long-established processes, and want to ensure a grants management system can support the way they do business. On the other hand, a number commented that some foundations over-emphasize the importance of maintaining their current processes.

This report summarizes the findings from all of our interviews as a relatively unpolished interim look at our research. These findings, as well as the findings of our Grants Management Software Survey (available at http://www.idealware.org/gm_survey.php), will be incorporated into a more polished and accessible Consumers Guide to Grants Management Software. This Guide will provide a summary of the features that many grant-makers will find useful in grants management software, and a detailed look at how well the existing software packages meet those needs.

About the Research

From November 2007 to January 2008, Idealware conducted hour-long telephone interviews with 25 participants. 6 interviewees were consultants who worked with foundations to choose grants management software, and 19 were staff members at foundations. Of the foundation staff members:

- 6 worked at **community foundations** or other re-granting organizations
- 4 worked at **corporate foundations**
- 3 worked at **family foundations**
- 4 worked at **independent foundations**
- 2 worked at foundations that they designated as another type of **private foundation**

These staff members served in a variety of roles – many filling several roles at the same time:

- 15 had **grants management** responsibilities
- 14 had **programmatic** responsibilities
- 7 had **finance** responsibilities
- 5 had **IT** responsibilities
- 4 were members of the **executive team** or board of directors

We looked for staff members who represented a variety of foundation sizes:

- 6 had fewer than 10 employees
- 6 had 10 to 24 employees
- 4 had 25 to100 employees
- 3 had 100 or more employees

As well as a variety of grant volumes:

- 2 gave fewer than 50 grants in their last fiscal year
- 6 gave 50 to 250 grants
- 5 gave 250 to 500 grants
- 6 gave more than 500 grants

And grants management systems:

- 2 used Excel or no system
- 8 used a custom system (3 were using a custom system as their primary grants management software)
- 7 used GIFTS
- 8 used a packaged system other than GIFTS

Finally, when asked about their foundation's relationship with technology, 8 interviewees identified their foundation as "In trouble" or "Conservative", and 10 identified it as an "Early Adopter" or "Fast Follower".

The consultants were recruited based on contacts known to either Idealware or Solpath, one of our funding partners. 4 of the foundation staff members were chosen by the research team because of prior knowledge that they had an interesting viewpoint on grants management system issues; the other 15 were chosen based on demographic information from the more than 150 candidates who volunteered to be interviewed on our previous Grants Management Software Survey. (Survey participants were recruited through posts to listservs such as the Grants Managers Network and outreach through local and topic-based grant-maker associations).

Note that for the sake of anonymity, and as the majority of those interviewed were female, all interviewees are referred to with feminine pronouns (“she”, “her”)

The majority of the interview consisted of walking the participant through a set of specific steps in the grants management process (i.e. gathering applications, review). For each area, we asked for their thoughts about the features that would be most important to them in an ideal future system. We also asked a set of questions in regard to system setup, cost, maintenance, support, and views on hosted vs. installed solutions. In addition to these questions, consultants were asked for their perceptions of commonalities between foundations, and potential gaps in the grants management software marketplace.

Grants Management Processes

We spent the bulk of the interviews asking the consultants and foundation staff members to discuss the most important characteristics of an ideal grants management system to support the typical stages of a grants management process. This resulted in a huge amount of data about the most core needs - about collecting applications, grant review, tracking existing grants, accounting, reporting, and more.

Accepting Grant Applications

For many, the grant cycle began with the collection of application information. For grant-makers who accept unsolicited proposals, the application process was often complex and involved several application rounds. For those who accepted proposals only by invitation, the process was a more streamlined but still vital way to collect the information needed in order to effectively review potential grant opportunities.

Application Information Collected

What types of data do grant-makers collect as part of the application process? We didn't ask specifically, but over the course of the interviews, a number of people volunteered this information, and shared which data was most problematic to collect. Some of the data that foundations wanted to collect during the Letter of Interest (LOI) or proposal application stages included:

- Basic identifying information, such as the organization's name, EIN, and address
- The contact person for the application, and their contact information
- Fiscal sponsor information, if applicable
- Background information on the organization, such as the mission, programs, or board of directors
- Whether or not the applicant has spoken to anyone at the foundation
- A description of the project for which they are requesting money (gathered through structured questions or in the form of a long narrative)
- The amount of money and time estimated for the project
- A budget for the project
- Organization financials, such as an income statement
- A designation of the program or subject area of the application, to help the foundation route it through the appropriate program or reviewers
- A signature from the project sponsor. 3 organizations mentioned it is a challenge to collect signatures in a way that works well with an online process
- The outcomes or metrics that will be tracked over the course of the project
- Background documents, such as the annual report or 990 forms
- Letters of recommendation
- Answers to questions filled out by multiple members of the applicant's project team
- Multi-media files, such as images, audio or video

A few organizations found it desirable to collect all of this information in the form of individual data fields, rather than attachments or long narratives (one interviewee even talked about collecting organizational budget line items in a way that her foundation could generate a cash flow and a balance sheet for the applicant automatically, based on the line items entered). For the most part, though, foundations envisioned collecting and storing this data as a combination of data fields, narratives and documents (whether electronic or on paper).

One interviewee described a typical tradeoff: "You can either do the whole [application] as data fields, or it allows attachment as a file, and we usually do some combination of those. If you have an attached file, you can do any sort of formatting and be pretty flexible about that, but then you don't capture that data, and there's no easy way for you to find it again."

> "If you have an attached file, you can do any sort of formatting …. but then there's no easy way for you to find [that data] again."

4 interviewees mentioned that in the transition to online applications, asking applicants to upload documents was a particular challenge. Grantees have different levels of internet access and technical skills, as well as different software packages, and it can be hard for them to submit documents electronically – particularly ones that they have only in paper form and that would need to be scanned.

Several people mentioned that they collect materials that can't easily be submitted electronically (i.e. annual reports, physical models of stage sets), and thus will always need to collect and track offline materials.

Tracking Application Materials

Collecting and tracking all of the required supplemental materials were a challenging task for many. 6 of the 19 staff members interviewed mentioned that they use or would like to be able to use some sort of checklist functionality to track what information they had and what was needed. As one foundation staff member put it, she would like to track "Do we have everything we need? But also, do we have the right information to make a decision?"

On the other hand, 5 of the 19 foundation interviewees didn't feel the need to track much detail about applications at all – their ideal process involved storing only a few key fields about the application, and then either a proposal attachment or the fact that they had a paper proposal. For instance, one interviewee when asked how they tracked if they had everything they need from an applicant simply said, "I look at it."

Online and Paper Applications

When asked about features to facilitate the grant application process, nearly every interviewee – 23 of the 25 interviewed – brought up the idea of an online application process. While not everyone was currently using web-based application systems, all but 2 of the foundation staff members interviewed said they would like to. Many found online application processes to be absolutely critical – as they said, "online is the way to go," and "electronic submission is very important." Several people mentioned online processes as a key decision making factor in looking for or choosing a new system.

"Electronic submission is very important"

Interviewees felt online applications were important to avoid the time investment and potential errors of manual staff data entry. They also liked the fact that it made the process self-serve for grantees.

The 2 staff members who did not find the idea of online applications useful both worked within small foundations that relied entirely on paper for their review process. As one said, if she took applications online "then I'd have to print the damn things out, and that's pointless."

While online applications processes were very desirable for most, and mailed or faxed applications were an "annoyance we want to get away from," at least some volume of paper proposals was a fact of life for many. Several mentioned the need for a system that would allow them to manually enter key information about applications, or application materials, received via traditional paper LOIs or proposals, as well as accepting online applications. 2 staff members mentioned that while it would be desirable to take LOIs online, as they received many fewer proposals and then reviewed them in paper it might make sense to continue to accept proposals in paper.

Paper applications are an "annoyance we want to get away from."

Online Application Software Features: Grantee Ease of Use

9 of those interviewed mentioned the importance of an online system that makes it easy for grantees- even ones that are not very technically savvy – to submit the needed information. Several felt very strongly about this – for instance, one asked, "Are we serving people here, or are we asking them to genuflect?"

More specifically, interviewees mentioned making the online application process easier for grantees by:

- Allowing grantees to save their application and come back later
- Warning grantees that their final submission is irrevocable
- Allowing grantees to spell-check
- Helping the grantee if they forget their password
- Sending an automatic email to grantees confirming receipt of their application, and an estimated time-frame for follow-up contact
- Carrying over LOI information to the proposal stage, so it doesn't have to be re-entered
- 2 foundations mentioned that they'd like their grantees to be able to leverage their online applications to apply for other grants with affiliated partner foundations

Several people used metaphors from other online transactions – for instance, ecommerce or job application system – as a model for how online applications should ideally work. One said, "I can't understand why grants application processes can't be that way [like a job application system]".

Online Application Software Features: Vetting and Routing

About half of the interviewees (13 of the 25 interviewed) had relatively straightforward needs, which were covered by the more basic application process described above. The other half, however – primarily those working with foundations that handle a sizable volume of grants, and particularly a high volume of unsolicited grant applications – described more elaborate systems that would help them vet or route the applications.

The features in this area that were most commonly mentioned include:

- **Pre-qualification questions.** 6 interviewees mentioned the concept of an eligibility quiz, where an applicant would need to answer some specific questions (such as 501(c)3 status, or geographic location) and be pre-qualified either automatically or with a staff "registration" process before they can proceed in the process. As one consultant said "An eligibility quiz can fast track things"

> "An eligibility quiz can fast track things."

- **Automatic 501(c)3 checks.** 4 people mentioned that it would be desirable to have the system automatically check to make sure the organization is a 501(c)3
- **Conditional questions or branching.** 2 wanted to be able to define branches in the online application based on the grantees' answers – for instance, to allow 501(c)3s to see a different set of questions than those that are fiscally sponsored
- **Foundation control over logins.** Several wanted a sophisticated login system that allows a foundation to vet an applicant before giving them a login
- **Applicant roles.** The ability to create multiple logins to allow several people from the same organization to collaborate on an application was desirable. The ability for a grantee to setup logins for additional people – for instance, a financial contact, or those who will write letters of recommendation - was also mentioned, as was the ability to give an organizational contact access to only one part of the application – to, for instance, not allow the project sponsor see a letter of recommendation

More complex features that were only desired by one interviewee include:

- The ability for one organization to have multiple applications in play at one time
- The ability to support 3 different application stages (an LOI and 2 proposal stages) before a grant is approved or denied

Customization of Application Processes

8 interviewees mentioned the importance of being able to customize application forms to their own processes. The information gathered and workflow processes clearly differed not only from foundation to foundation, but also between programs and over time within the same foundation. Some of the things that interviewees mentioned as especially desirable to customize were:

- The information that is requested (and the ability to include custom fields that might apply only to them)
- The eligibility rules that define what applications are accepted
- Whether data is collected via narrative, attachment, or data fields
- The text of email responses that are automatically sent to applicants
- What stages an applicant goes through (i.e. is there an LOI as well as a proposal? Additional stages?)

As one consultant said "[The process] needs to be fairly customized to the organization- not just on intake, but on every step of the way. You need a flexible mechanism for intelligently routing."

Several mentioned the desire to be able to customize a new online application process themselves, to quickly and inexpensively setup a new program, for instance.

"[The process] needs to be fairly customized to the organization- not just on intake, but on every step of the way."

Reviewing Grant Applications

The process used to review the applications received varied dramatically from organization to organization. 2 of the smaller organizations had quite informal processes where internal staff reviewed paper proposals and then made decisions via meetings without ever using a grants management system. On the other hand, a few of the organizations who accepted large numbers of unsolicited grants had very complex processes which involved a substantial number of external and internal reviewers, who all reviewed the grant in a specific order and gave feedback in quite structured ways, all within the grants management system.

Core Review Functionality

Many of those interviewed relied on a basic set of information in order to manage their grant review process:

- A summary of the request, including narrative information
- Up-to-date contact information for the grantee
- A unique number for each application
- A history of the applicant's relationship with the foundation – i.e. have they been funded before? One interviewee mentioned that it's useful to see the foundation's history with the specific project director as well (particularly when they are funding a university project)

- The entire history of this given application – for instance, all the comments from the LOI stage for a project proposal
- Financial information, such as the budget summary
- Dates tracked for when the application came in, or when actions were taken
- The ability to find applications by considerations like programs, sub-programs, codes, or dates
- The ability to understand where an application is in the review process by way of a status code or the like

5 interviewees mentioned that it's important that reviewers can see the most important information together– "You'd like to have everything that's applicable in one place, so it's easily accessible for that organization, and that request."

9 interviewees said that they used or would like to use a system that tracks comments within the system, to avoid the need for "reprocessing or recapturing overhead." Several mentioned specifically that it was important for the system to consolidate the comments into one central location.

> "You'd like to have everything that's applicable in one place."

Another 9 interviewees expressed interest in features that would help reviewers to rate applications numerically using some standard scoring scheme. Once the reviewers have entered their ratings, the system should help tally or average the scores. One interviewee wanted a system that would go considerably further: one that would rank the applications and allow them to draw a funding line, and to study how one reviewer's score compared to another. On the other hand, a number of organizations used a "gestalt method of review" and formed an opinion without any ratings.

Supporting Board Meetings

Most interviewees also needed to support a meeting of board members or other committee members to make official funding decisions on grants. While this is typically an offline meeting, many foundations supported this meeting by creating paper summary sheets that summarize each grant. 9 different foundations volunteered that the creation of these summary sheets – often put together into a collection called the docket or the board book – is important for them. These summary sheets contain basic descriptions of prospective grants – for instance, description and grant amount – and in some cases considerably more information, such as comments from reviewers.

The creation of the docket is quite time consuming for a number of organizations, and 5 interviewees mentioned that they'd like to be able generate it out of the grants management system. However, because many organizations have specific review processes, and their board members are used to seeing information in a particular way, this frequently requires the ability to customize the information and layout of the application summary sheets.

2 interviewees mentioned that they'd like to be able to use their grants management system directly for their committee meetings – perhaps by projecting information from the system on the wall.

Online Systems and External Reviewers

The desire to include external reviewers in the process was one of the more complex processes that interviewees desired to support. 8 of the 19 foundation staff members mentioned that would like to include external reviewers in their process. The grants management system features desired to support this ranged from the simple ability to enter the reviewer comments that were passed on off-line, to extensive online systems to collect first hand reviewer comments and scores. Core functionality that was desired to support external reviewers included:

- 4 interviewees mentioned the importance of online systems to support external reviewers
- 4 interviewees desired that the system have functionality to help assign applications to reviewers – to allow the foundation to assign, allow the reviewers to pick which they'd like to review, or potentially to flag potential conflicts of interest among reviewers

For instance, one interviewee wanted the grants management system to help him select external reviewers from among those in their database. "We would ultimately like to see a pool of panelists both by specialty and some demographic information because we are concerned with the diversity of our panels. And certainly on what panels they have served on in the past- to give us a sense of their expertise, but also there are some instances where if you have served on a panel we don't want you on that panel for another 3-4 years."

A number of foundations – an additional 6 foundations - desired online review functionality to support just their internal staff. The key strengths of an online review process that were mentioned were:

- 6 interviewees mentioned that it's very useful that reviewers can access the system from anywhere. Staff members are no longer "tied to their desk" on grant deadline day, and any reviewer can "pick up and go, and do this wherever"
- 3 foundations mentioned that online review greatly reduces their workload for remote reviewers - otherwise, they need to print out and mail paper packets to each reviewer, which is often a hugely labor-intensive task

With online review systems, staff members are no longer "tied to their desk" and can "pick up and go, and do this wherever."

As one interviewee said, "For the first time, we are doing online panel review. It's less work on the back end. If what's been done up front has been done correctly, then you don't spend a lot of time manipulating once you're ready to start reviewing things. It's all ready- it's all done."

However, several foundations mentioned that they "struggle to get reviewers to use online systems", and issues of ease of use and ease of printing the applications can be a barrier. As many reviewers are not very tech savvy, it can be hard for them to adjust to online processes.

Workflow
10 of those interviewed mentioned that features to help the foundation route each application to the person who should review it next would be helpful. As one interviewee mentioned, without a way to manage the workflow, they're constantly asking each other "do you know where that folder is now?" These interviewees generally agreed that such features would alert each staff member as to what applications they should review and allow any system user to see who owns the application, who has reviewed it, and where it is in the process at any given time.

4 people mentioned that providing a "portal" type view, where each user sees a customized view of grants management information that applies to them, could be helpful in the review process. 2 mentioned that some sort of automated notification system would help staff members know what applications have just come in, or what was ready for their review.

"Do you know where that folder is now?"

3 of those interviewees mentioned in addition that it would be desirable to define the order of reviewers, and who should review concurrently or sequentially, and then have the system automatically forward the application to appropriate reviewers based on who has already reviewed. 1 person added that it would be useful to allow reviewers to add an additional reviewer in the system.

Customization of Review Process
As with the application process, many foundations felt that it was critical to be able to customize aspects of the review process – 9 people mentioned this. The most common areas that interviewees felt should be customizable were:

- Whether or not a particular review process (specific to a program within a foundation) should require comments, a numerical score, or both
- The scoring system used
- Who should see what applications in what stage in the process

Due Diligence

For most organizations, there is a level of due diligence involved in grant-making – for instance, checking to make sure grantee organizations have 501(c)3 tax status, or confirming that they're not on terrorist watch lists.

Nearly every interviewee we asked about due-diligence issues mentioned the need to check organization's 501(c)3 status. The majority either checked this status on Guidestar, or asked prospective grantees for proof of their tax status – or both. A number of interviewees desired functionality to help with this – as one said "Getting the tax status is the first step – there's no reason it can't be part of the grant tracking system". Features that interviewees found particularly desirable in this area included:

- 10 interviewees mentioned that an automated 501(c)3 checking would be desirable in an ideal grants management systems. For some, this meant being able to click on a link within the system to quickly go to the organizational record on Guidestar. Others would like the system to go farther – to automatically compare against a master file, and flag organizations in the grants management system that do not appear to be valid 501(c)3s
- 3 interviewees mentioned that it can be more difficult to verify the status of new organizations, or those that are public nonprofits but do not have 501(c)3 status
- 2 interviewees had concerns about the accuracy of the IRS 501(c)3 records, and mentioned this as a downside of automation
- 1 interviewee expressed an interest in capturing and storing a screenshot image from Guidestar for their legal records

7 organizations mentioned the desirability of checking organizations against the OFAC (Office Foreign Assets Control) lists. Laws passed in the wake of September 11, 2001 instituted stiff penalties for grant-makers engaging in transactions with known terrorists, and the US government published guidelines suggested that to be in compliance with these laws, funders should collect very detailed information about grantees, and verify this information against several government lists of terrorists, including the OFAC list.

"We're currently not doing as well as we could be on checking some of those lists."

None of the foundations were completely happy with the way they were handling OFAC list checking – the sentiment that "we're currently not doing as well as we could be on checking some of those lists" was common. 3 mentioned that they'd like something more automated, while another was very concerned about false positives on terrorism watch list for common names ("is my Mohammad the same Mohammad?"). 2 said they were aware of the guidelines but weren't checking the OFAC lists – one mentioned that the local nonprofits they fund "for sure won't be on the list", while another with a substantial donor advised fund mentioned that the volume of grants they make simply makes checking impossible. One interviewee reported that their foundation outsources the list checking, which shifts the liability to the outside firm in the event of a problem.

Tracking Info after Grant Approval

For most foundations, the board approval of a grant kicks off a whole new process: the tracking of payments and the reports or other requirements on which payment is contingent.

Tracking Payments, Grantee Reports, and Payment Requirements
The grantee requirement tracking process was not a substantial one for all of our foundation participants. 3 foundation staff members mentioned that they pay out all their grants – typically small grants in the thousands of dollars - in a single payment, and don't require any reports from the grantee about the grant.

16 of the 19 foundation staff members, however, were tracking complex enough information in this stage that wanted help with this from a grants management system. Typically, they wanted to be able to track the payment dates for a particular grant, the due dates of any reports, information, or other pre-requisite milestones required in order to process each payment, and then whether the grantee has met those requirements.

As one interviewee said, "Our ideal system would allow us to . . . follow up with them in terms of their requirements, accountability forms - whether they're quarterly, monthly, whatever it is - a system would allow us to track that. … And if an organization has missed a deadline for one of those reports, [the system] allows us to flag that record."

"Our ideal system would allow us to . . . follow up with them in terms of their requirements…And if an organization has missed a deadline for one of those reports, [the system] allows us to flag that record"

For most, the first step in the process is to establish the schedule of payments and requirements. Some foundations use a standard schedule from the date the grant was approved (i.e. reports are required and payments made on a standard every-six-month schedule), while some work with the grantee to create a schedule specific to the grantee. Some foundations try to align all grantees to a standard calendar so all reports would be due in the same week, for instance, while others try to stagger the milestones through the year.

With the schedule set, the foundation then needs to track whether the grantee meets their requirements on time. The most common information that foundations desired to collect from the grantees as requirements of their payment, in approximate order of number of mentions:

- Administrative forms or agreements
- Financial summaries or expense reports
- Summaries of whether they had met their specific objectives
- Other metrics or evaluation information
- General narrative progress reports
- Detailed line item budgets of how money was spent or re-granted
- Annual report or other overall organizational financials

Not all requirements were of submission of information to the grant-maker – for instance, a grantee might be required to raise funds to match the grant amount, or to submit reports to someone else.

Foundations had different approaches to reviewing the reports that they received. Most wanted to track primarily that reports were received, but 3 foundation staff members expressed the desire to mark that they had been read and approved. One consultant pointed out, however, that it can be dangerous to define a system workflow which is dependant on report approval, and if the staff is too busy to read reports it can either create a bottleneck or encourage staff to mark things in the system as approved even though they haven't read them.

When all requirements for payments have been met, a payment request is made (generally via a paper request) to accounting. Accounting makes the payment, and feeds information back to the grants management system (either via an automated feed, or manually) about the payment amount, date, and method. See the Accounting section for more information on this process.

Updating Grant and Grantee Information

Throughout this process, which sometimes spans several years, the team needs to be able to track and update core information about the grantee, including who the contacts should be, who should be paid (for instance, in the case of a fiscal sponsor), and the relevant contact information.

3 people also mentioned that it is important to allow staff to enter notes about the grantees' process. This can be useful in the case of a staff transition or to document problems in case action needs to be taken.

2 stated that there are also occasions that the amount to be paid out changes over time – for instance, if the grantee requests additional money, or additional expenses are approved. In this case, the interviewees mentioned, it's important to be able to change the future amounts without overwriting the record of the amount that was initially approved.

Managing Schedules and Workflow

Managing all the dates and requirements can demand substantial effort, and 11 interviewees mentioned that they'd like the system to help remind them, or their grantees, of upcoming dates. 8 interviewees mentioned using automatic emails for this purpose – for instance, to email a reminder to grantees a couple of weeks in advance of their report due dates.

6 mentioned the desire to have the system notify internal staff members about actions that they should take – for instance, to remind the grantee to submit a report, to review a grantee report, or flag missed deadlines for follow-up.

Online Submission and Tracking

8 interviewees expressed interest in the ability for grantees to submit reports online – either by uploading documents, or filling out pre-set online forms – which would then be automatically marked as received and attached to the grant record in the grants management system. 2 mentioned as well that it would be desirable to allow grantees to review the requirements and schedules online, in order to manage their own reporting process.

Communicating with Grantees

Throughout the grants management process, foundations need to reach out to grantees with status updates, requests, or formal communications. This is a key area of growing concern to foundations: when we asked about communications, 5 interviewees mentioned that it was a very important area. While many of the comments were about more traditional outreach methods, such as letters, there was also substantial interest in newer approaches, such as email blasting or applicant/grantee web portals.

Letters

For the majority of interviewees, asking about communicating with grantees brought to mind the creation of physical letters. 17 of our 25 interviewees mentioned letters – for instance, award letters, rejection letters, payment letters or reminders - as an important communications method.

> "The templates have to be there. Being able to set that up is huge."

For almost all of them (16 of them), this meant the easy creation of mail-merged letters out of a grants management system based on system templates – and a number of them felt that this was a critical feature. As one interviewee said, "The templates have to be there. Being able to set that up is huge." When asked about mail-merging from templates, another said simply, "That's a given." Yet another mentioned the ability to easily create letters for a grantee with the click of a button from the grantee record as one of the main things she liked about a new system they were buying.

Email

14 interviewees mentioned that email communications were desirable – in fact, 4 mentioned that they are currently communicating largely by email rather than by letter, or are trying to move to a more email-centric process. The primary desires for one-on-one email communications were largely the same as for letters – to be able to easily create emails out of the grants management system with a click of the button.

11 mentioned the desire to be able to set up automated emails in the system – for instance, to thank applicants for applying and telling them what to expect next, or to remind a grantee that an interim report is due in 2 weeks. Automated emails came up most often in regard to the tracking of grantee reports and requirements, and are discussed in more detail in the Tracking Grantee Reports and Requirements section.

3 also mentioned that they are or would like to send emails to a whole group of recipients at the same time – for instance, to everyone involved in a grant cycle of an upcoming deadline, or to let all grantees know about an event.

Customizing Communication Templates
For both emails and letters, those interviewed mentioned the importance of being able to easily customize templates to tailor them to the needs of the foundation, or to add new templates. Ideally, these templates could include complex logic that accounted for different situation (for instance the award letter for an organization with a fiscal sponsor, or combining 2 overdue requirements into a single reminder email). A few interviewees also mentioned that they'd like to be able to easily view and tweak a merged communication by hand before it went out.

Storing Contact Information
Clearly, system communications require up-to-date and centralized contact information. Several mentioned the need to be able to track a number of different contacts and their roles for each grant, and the ability to be able to easily update contact information over time.

Tracking Communications
Nearly half of the interviewees – 11 of them – also felt it was important to be able to track a record of the communications with each applicant or grantee – whether by letter, email, or phone - within the grants management system. In particular, 5 found it desirable to have the system automatically save a copy of each system generated letter or email. As one foundation staff member pointed out, it's particularly important to have a record of communications so if there is a staff transition, the new staff member can figure out what took place.

6 interviewees took this idea a step further, mentioning that it's important to centralize all information about the foundation's interactions with someone in order to deepen their long-term understanding and relationship with constituents (this concept is frequently referred to as Constituent Relationship Management). As one interviewee said, in some systems, an applicant "doesn't exist until a proposal lands on your desk." She'd like to track the full relationship instead, for instance "when I get coffee with a grantee." 2 of these interviewees also mentioned proactively managing their relationships – for instance, being able to generate a list of all those that they hadn't heard from in 6 months so they could reach out, or keeping in touch years after a grant to hear about additional long-term outcomes.

In some systems, an applicant "doesn't exist until a proposal lands on your desk." She'd like to track the full relationship instead, for instance "when I get coffee with a grantee."

An Applicant/ Grantee View of the Grants Management System
10 interviewees – including 4 of the 5 community foundation staff members – mentioned that it would be desirable to allow grant applicants or grantees a limited view into the grants management system, and to easily communicate with the foundations. They saw the benefits of this functionality as allowing grantees to be kept in the loop and feel listened to, and providing transparency to the process, while also reducing the level of check-in inquiries that need to be handled by the foundation. Ideally, "people would just get familiar with it so that they would know to just go to the portal to find out where they sit on whatever it might be."

5 mentioned specifically that it would be useful to allow applicants to check the status of their application, while 2 mentioned that a grantee interface would allow grantees to upload their reports online and check on when deliverables were due. As one interviewee said, "Being able to share documents and share information [online] . . . is a transparency between the requirements and whether or not they've been met and the communication between both parties . . . It could help ease a lot of concerns on the part of grantees and administrators."

"They would know to just go to the portal to find out where they sit."

Website Outreach
6 people mentioned the role of the foundation's website in the grants management process – for instance, in helping to educate applicants as the guideline and deadlines for a grant, or as a method to attracting new applicants. 3 mentioned that the ability to integrate their website with their grants management system would be useful, particularly to be able to track how many people on their website applied for a grant, or what information they looked at before they applied.

3 mentioned that they'd like to explore the role of their foundation in bringing their grantees together into a community – for instance, to provide a meeting place for them to share information or collaborate online.

Document Management

For most foundations, the grant application, review and monitoring process involves a substantial amount of information that can't be collected purely as data fields: for instance, formatted grant proposals, 501(c)3 verification letters, 990 forms, audited financial statements, copies of correspondence (letters or emails), signed statements of various sorts, or photos. Foundations had a variety of tactics to deal with their supplemental materials, from one interviewee who summarized her paper filing technique as "Stuff that comes in first goes on the bottom of the pile, stuff that comes in later goes on the top of the pile," to organizations with sophisticated scanning and online document management operations.

3 foundations (all fairly small) were currently tracking all supplemental information in paper, and had little interest in electronic document management (as one said, "We're still a paper

society here"). For the most part, though, interviewees were interested in collecting documents electronically – 15 (including all 6 of the consultants) felt that some kind of electronic document management is desirable, and 3 of the 6 consultants identified electronic document management as a core grants management need and a gap in the current systems. As one consultant said, "Very few systems have actually addressed this, however when it is employed, it's great."

"Very few systems have actually addressed this, however when it is employed, it's great."

However for many, the reality differs from the ideal – many felt that some paper was inevitable (as one consultant said, "I think paperless is a myth"). 3 mentioned that it could be difficult to get potential grantees to submit documents electronically ("the biggest thing was just to get the documents"). As most received at least some volume of paper materials, and scanning can be time consuming, a number of foundations were managing a combination of paper and electronic files.

Only 3 foundations interviewed mentioned scanning documents as part of their process; it was more common to try to get grantees to submit information electronically as opposed to scanning paper on the foundation end.

"I think paperless is a myth."

Most agreed that it was desirable to have documents stored electronically and linked into the grants management system. However, several pointed out that it could be a challenge to define to exactly what the records should be attached. Ideally, some documents (like proof of 501(c)3 status) would be stored as part of an organization record, while some (like project budget spreadsheets) would be attached to the grant – or regardless, making sure that documents are easily viewed when relevant as part of the overview workflow. Making this process as automatic as possible – for instance, allowing prospective grantees to submit documents online, and then automatically uploading and labeling them so they show up in the right place and it's clear what they are.

2 mentioned that it was desirable to have all data stored as individual fields in the database. For instance, one organization kept two versions of application information – one formatted into an easy to print and read application format, and one with each field and section parsed out into easy to search data fields.

There are also software considerations. 3 of the consultants interviewed mentioned that it can be difficult to define the relationship between the grants management functionality and the document management functionality – should they be separate but connected software applications? Or together? And how should the files be physically stored? 2 mentioned that the common paradigm of throwing documents onto a file share was likely not the best way to go. One consultant pointed out that it was better to have a separate document management system, as that ensured you could easily migrate your documents if you moved to a new system.

Interviewees had some specific document management feature requests. 4 mentioned that being able to easily search the full text of documents via keyword was important. Other desires mentioned included easy handling of large file sizes, the ability to automatically capture documents sent via email, easy support for electronic signatures, and the ability to store multiple versions of one document. One consultant mentioned that document uploading ease-of-use was critical, as staff won't include documents in the system unless it's easy to do.

Accounting

Interviewees had a quite consistent vision of the ideal flow of information between the grants management and accounting functions. The most commonly mentioned flow of information was:

- When a payment was due and all the requirements around that payment had been met, they wanted to be able to easily notify accounting that a payment should be made, and pass them all the pertinent information (amount, who should be paid)
- In the grants management system, they wanted to be able to see the dates, check or wire transfer numbers, and the amounts of each payment made
- Throughout the process, they wanted the ability to easily pass finance the projected upcoming payments for tax and cash flow planning purposes

As one consultant said, accounting processes and financial reporting "can be a huge time suck."

While most foundation staff members interviewed expected that check requests would go through accounting (and several felt that this process involved more back and forth and paperwork than they would like), 2 of those interviewed mentioned processes in which the grants management team cut the check themselves.

Accounting processes and financial reporting "can be a huge time suck."

Integration with Accounting Systems

While a few of the smaller foundations were happy to manage the flow of data between their grants management and accounting systems manually, by exporting and then importing a report or re-keying information, a number had or desired a tighter integration that allowed information to flow automatically. One of the consultants mentioned that when considering this type of integration, updates are a key concern: what will happen when the accounting package is updated? If you're using a feed that's provided by a vendor, how long will they take to update the feed to account for any changes?

Regardless of how integrated the systems were, however, 11 different interviewees (including 4 of the 6 consultants) spontaneously mentioned the importance of separating finance from grant making functions as a "prudent separation of duties", although several acknowledged that this can be challenging in small foundation. The separation – where a different set of people approve the grants than write the checks - provides a "checks and balances system" to prevent any possibility of fraud, and also helps the grant management process run with less red-tape, as it ensures that accounting "keeps their sticky fingers out of anything grant related."

2 foundation staff members mentioned that the finance staff members would ideally have their own interface to the grants management system that would highlight finance specific information.

Separating finance from grant making processes provides a "checks and balances system."

Desired Accounting Related Features

When asked about what would be desirable in the accounting area, interviewees brought up a number of features that they would like to see:

- 3 interviewees mentioned the desire to be able to be able to reliably do wire transfers or direct deposits
- Several mentioned the need to be able to easily pay someone other than the grant recipient – for instance, a fiscal sponsor or the institution, for a scholarship
- Several mentioned that accounting became more complicated for multi-year and multiple payment grants, and features to help with this are important
- One interviewee mentioned that support for foreign currencies was a core need for her foundation
- One consultant mentioned that the need to split grants among a number of different funds or programs is a common problematic accounting issue
- One corporate foundation staff member mentioned that they needed to be able to track what portion of a grant is tax deductible, for accounting purposes

Accounting Needs within Community Foundations

3 of the 6 consultants we spoke to mentioned that community foundations have substantially more complex accounting needs than most other foundations, and the conversations we had with community foundations staff members supported that. Because community foundations have a substantial amount of money coming into the foundation – much of it restricted as to what it can be used to fund – as well as substantial money going out in the form of grants, accounting and grants management features are closely tied. While most private foundations don't need to be substantially concerned with cash flow, community foundations need to separately track the incoming and outgoing money for each of their funds – and they often have hundreds or thousands of funds. This results in a number of impacts on their accounting processes:

- With so many funds, organizations sometimes have the need to transfer money from one fund to another, or to combine funds, which several foundations mentioned as a challenge
- There are complex accounting needs for donor advised funds, a common setup for community foundations in which an individual donor in essence donates a substantial sum of money to the foundation and then dictates where the foundation should grant the money

- 2 of the 5 community foundations that we spoke to (the two with the highest volume of grants made) used integrated packages that support both grants management and accounting features, to allow the tight integration needed
- One of these foundations had substantial accounting needs beyond grants management – they ran both a theater and a parking lot, and had the associated complex accounting needs to track revenue and expense. For them, the need to find one system to support both grants management and complex accounting needs was difficult to accommodate

Budgeting

We asked organizations what functionality they would like in a grants management system that would help them in planning or budgeting their grant making process. Not everyone found this area to be useful at all – 5 organizations (primarily ones that weren't giving out many grants per year) did not see much of a need for budgeting functionality. These organizations typically defined an overall amount that they will grant for the year, and then fulfill it. One small foundation staff member said they typically don't do much planning, but instead most often fund immediate projects or disaster-related needs. An additional 3 foundations mentioned that they were currently struggling with how they should budget.

Among those who did find the idea of budgeting useful, the most common need was the ability to track the amount that the organization would like to pay out, has paid out to date, and has left to pay out for the year across a series of buckets: different programs, most commonly. The core purpose of budgeting for most foundations is to be able to easily know, as one consultant said, "Am I doing okay on my budget? Will I meet the pay out? Can I give more grants?" A foundation staff member added that it would be a huge help to have a system that could tell her "So far you've spent half of your budget, all on universal healthcare, but you wanted to spend at least 25% on environmental health issues." A number of interviewees mentioned showing this information as a core financial report, which one dubbed the "Are-We-Going-To-Meet-Payout" report.

"Am I doing okay on my budget? Will I meet the pay out? Can I give more grants?"

For many private foundations, the target total amount that should be paid out is often set as a simple calculation: 5% of their total endowment, as is required by law. The amount to be paid out is more complicated, however, in situations where foundations are receiving as well as paying out money (as is typical for community foundations, for instance.) One consultant mentioned that small foundations often get around the need to budget carefully by having a set of "preferred nonprofits," to which they will simply give at the end of the year whatever amount is needed to meet the 5% payout.

Defining the amount that a foundation has left to give of that spending target tends to be more complicated. In particular, 5 interviewees mentioned that more complex awards like multi-year grants, renewable grants, and contingent payments add complexity to forecasting, as they mean that money committed in previous years has to be paid out in the current year.

More specific needs caused additional complexity among foundations. Some of the other factors that made budgeting more complicated for some foundations included:

- 4 interviewees mentioned the need to track not just granted income, but expenses such as their own overhead, marketing, events, and travel
- 3 interviewees, 2 of them consultants, mentioned that it can be desirable to track the budget not only by program but by hierarchically arranged subprograms, which then requires the ability to roll-up or drill into line items
- 3 interviewees mentioned the need to budget by more than one set of categories – for instance, to track the budget not only by program, but also by fund, crosscutting interests, program officer, or region
- One consultant mentioned that some larger private foundations budget for the amount to be awarded in a year, as opposed the amount to be paid out. This can be a difficult requirement to handle in the existing grants management systems
- One consultant mentioned that grants that are spread across multiple programs could be difficult to automatically include in budgets, as it requires the ability to define that some portion of the grant money applies to each of multiple programs

2 consultants mentioned that budgeting tends to be particularly complicated for corporate foundations, and in fact 3 of the 4 corporate foundations we spoke to had relatively complex desires in this area. 2 had significant needs in tracking expenses, while one needed to be able to slice and dice her budget by 4 different factors.

Interviewees desired some specific features to make budgeting easier. For instance:

- 2 consultants mentioned that it would be useful for foundations to do scenario planning, to understand what it will do to the budget if they take a certain course of action. For instance, "If I have $5M this year, and next year I might get a $500K bump, and I commit $500K for the year ahead, then I can stay in my course of $5M a year?" Or, "If I want to roll out a new program in 3 years, could I do it?"
- 2 interviewees, one corporate foundation and one referring to corporate foundations, mentioned the need to be able to "roll-over" a grant from one year to another – for instance, to give $1000 to a particular local organization almost automatically every year
- One interviewee mentioned that a budgeting worksheet, which would show a summary of grant making and expenses for previous years and allow her to fill in the next year, would be useful
- One consultant pointed out that it is important for a system to allow adjustments to the planned budget over the course of the year

"If I have $5M this year, and next year I might get a $500K bump, and I commit $500K for the year ahead, then I can stay in my course of $5M a year?"

Reporting

8 interviewees mentioned that their current system did not have as strong reporting functionality that they'd like it to have (at a minimum – one felt hers was "abysmal", another said reporting was "extremely weak", while a third said "it doesn't work – it makes me mental"). One of the consultants mentioned that her clients frequently felt that they "don't like whatever they have [for reporting], and thus something must be better."

A number of those interviewed found their reporting functionality "abysmal" or "extremely weak."

What kinds of reports do foundations want to generate? We didn't ask interviewees for a comprehensive list, but some of the most frequently mentioned reports, in approximate order of the number of times mentioned, included:

- Funds planned, awarded and/or paid out by program or other budget area (most mentioned, by a long way, with 11 mentions)
- Number of grants awarded by program or other budget area
- Year-end tax and audit information
- Grantee metrics and outcomes information
- Number of grants at each stage in the application/ review cycle
- Which grantees have met their grant requirements, or their performance benchmarks
- Cash balance and cash flow management reports, to forecast payment amounts and dates

In addition to specific reports, 2 interviewees mentioned that they'd like to be able to aggregate grant data with other foundations, one interviewee mentioned that it was important to be able to run reports that can compare where you are for this year with where you were last year at the same time, another mentioned that the ability to create graphs is helpful, and a third requested the ability to export data to SPSS for statistical analysis.

Reporting Flexibility

When asked about reporting needs, the overwhelming theme was that reports should be flexible and customizable. Although we were not asking about customization specifically, a whopping 18 out of 25 interviewees mentioned a desire for reporting flexibility, including the ability to:

- 12 interviews wanted to be able to export to an environment like Crystal Reports or Excel that would provide this flexibility
- 7 interviews mentioned customizing report templates– for instance to internally create new reports or tweak fields or the layout of existing ones, and then save them. One of the consultants commented that every foundation she worked with has seemed to desire a different set of reports that those provided by the vendor, "even though they often don't know what they want in them"
- 7 interviews wanted to be able to create ad-hoc reports– so to be able to create a report on the fly out of almost any field in the system, and then save them. Foundations staff members wanted to be able to report on "whatever I want whenever I want," even when "I never thought I'd want to be able to search on that, but now I do." Another staff member said, "Ad-hoc reporting is mandatory"

Coding Grants

5 interviewees mentioned that coding grants – marking them with keywords to denote things like the geography, population served, or area of interest – was important to their reporting processes. Coding schemes, sometimes extensive or hierarchical, allows them to look the number or status of grants that apply to each area – for instance, "What have I done this year in the forestry area?" As codes are often quite specific to the programmatic areas served, several mentioned that it is import to be able to customize the codes.

Searching for and Finding Information

Through the course of the interviews, participants brought up a number of thoughts on the types of things they would expect to search for, and the groupings of information that they would like to see. Several mentioned problems in finding the information that they were looking for. One foundation staffer admitted, "We lose applications all the time."

> "We lose applications all the time."

The key ways that interviewees expected to search, and thus to find a grouping of all the information related to their search, were by:

- **Grant.** 6 mentioned (and we suspect that more simply assumed) the ability to search for and find a particular application or grant, by grant number or project name, and see the status of the application/grant and all the associated data and documents from throughout the life of the project
- **Organization.** 6 wanted the ability to search for an organization and to see a single, centralized set pf organizational information, including their mission, their history

with the foundation and past grants, contacts for particular purposes, and organizational documents like proof of 501(c)3 status

- **Individual contact.** 6 mentioned the desire to be able to search for a specific person in the database, to see their contact information and the grants that they have been associated with. For instance "all the grants I've given to Joe Blow"
- **Grant Cycle or Board Meeting.** 4 wanted to be able to find all the grants that were associated with a particular grant cycle – i.e. those slated for or approved at a particular board meeting. For instance, "Show me anything from so-and-so between these dates- whether the grantee is active or not"
- **Dates.** 4 mentioned the ability to search for grants by date (other than a board meeting date) – for instance, by a proposal received date, or the date paid.
- **Payee.** 2 mentioned the ability to search for the person or organization that was actually paid for the grant (as in the case of a fiscal sponsorship), as opposed to the organization that was funded
- **Documents.** As mentioned in the Document Management section, 4 wanted the ability easily search the full text of documents via keyword
- **Interests, Programs, Codes.** As mentioned in the Reporting section, 5 interviewees mentioned codes - keywords denoting things like geography, population served, or area of interest – as a key way to track and find grants by area of interest

Evaluation

Program evaluation – the idea of gathering information about a grant program and its outcomes and using this data to inform future decisions – is a frequently discussed topic. Evaluation can help a grant-maker to judge not only whether a grantee "has been productive with our funding," as one staff member said, but whether the grant-maker's processes and programs are themselves effective.

"Once you can define what the outcomes and indicators are, then it would be easy enough to make a system that tracks them."

During our interviews, when we asked about evaluation, 20 interviewees felt that evaluation was important, including 3 consultants who felt this was a major trend in grants management, but 10 mentioned that it could be difficult to integrate evaluation into overall business processes. 9 of the 19 foundation staff members interviewed don't currently have evaluation procedures in place, or feel that they should be doing more in this area. As one of these staff members said, "We just have to give money and if we give all the money then it's a success." Among the challenges mentioned were:

- 7 interviewees, including 4 consultants, mentioned that one of the core challenges is identifying what outcomes and data should be tracked. A number felt that once the organization had gone through the difficult process of defining fields should be collected to allow evaluation, the actual tracking of that data would be straightforward. As one said, "Once you can define what the outcomes and indicators are, then it would be easy enough to make a system that tracks them"

- 2 interviewees cited that evaluation was difficult based on the small size of their foundation. As one said, "With just the 2 of us [on staff], that falls off the radar screen"
- 1 interviewee described difficulty reporting for a high volume of small grants "Do we need a report for every thousand dollar grant?"
- 3 interviewees expressed concern as to whether asking for more data from grantees was warranted, based on the amount of administrative work already required for their grantees, or possible. As one said, "I wonder if the toughest nut would be making sure that we could get good data, on time." Or another "These organizations are trying to work with people – they don't have time to fill out ten page questionnaires every three months"

For many interviewees, evaluation meant building the collection of metrics and outcomes information into their overall post-grant information collection process. 4 mentioned asking grantees to define their expected outcomes upfront, so that they could then report on whether they had met their outcomes as part of their interim or final reporting process. An additional 4 mentioned collecting funder-defined metrics from the grantee as part of their process.

"These organizations are trying to work with people – they don't have time to fill out ten page questionnaires every three months."

4 interviewees stressed the importance of collecting qualitative, non-numerical data, as not everything can be quantified. One person stressed that personal narratives were far more meaningful than numbers.

3 interviewees wanted to be able to compare outcomes across multiple organizations, but mentioned that that it is difficult to get together the incentive and resources needed to create the standardization across organizations this would require.

While most initially thought of evaluation as a way of measuring the effectiveness of the funding they give out, 4 also mentioned the importance of evaluating their own grant making processes. One staff member felt very strongly about this, and talked at length about the opportunities to review data to determine "were we right in our assessments [of grants]? If everything always goes exactly as planned… then we're smarter than I think we are" and to look for patterns of bias in their analysis. 3 other foundations also felt it was important to analyze their data or to solicit input from grantees in order to improve their own processes.

"If everything always goes exactly as planned… then we're smarter than I think we are."

Donor Management and Other Specialized Needs

Although many aspects of the grants management process are similar, some foundations have additional business processes to manage and track, including donors, scholarships, volunteers, and matching gifts.

Managing a Donor Process

The 5 community foundations we spoke with had a huge additional area of concern: the need to encourage and manage incoming funds from external donors. As one staff member said, "Think of it as a supply chain - so I'm trying to get some resources from point A to point Z, with point Z being the community. When you're a community foundation… you have many point As. So there's a layer of complexity, where you're being the broker, but you're also being the air traffic controller of all these different resources."

These needs required substantial complexity on top of the core grants management process for these organizations. The key areas of additional complexity are constituent relationship management, donor advised funds, reporting, and overall accounting processes.

> "When you're a community foundation, there's a layer of complexity, …[you're the] air traffic controller of all these different resources."

Note that these additional needs can be as important or more important than the grants management process itself to community foundations. For instance, 2 of the organizations who worked primarily with donor advised funds did not have very sophisticated grants management needs. A donor advised fund does not typically require a substantial review process on the foundations' part - as the donor specifies where the money should go, and requires little grantee report or payment management after the grant - as most grants are small and paid in a single installment.

Constituent Relationship Management (CRM)

The foundations need to manage their relationship and communications with donors as well as grantees. The complex needs this can entail can be difficult to support in specialist grants management systems, and several organizations were using other packages – such as Raisers Edge or Crescendo – to manage this process. One organization had implemented a system that specializes in CRM specifically and was using it to manage their less complex grants management needs. Another was in the process of reconsidering all their systems, in order to better align them with CRM goals.

Donor Advised Funds

With donor-managed funds, a common community foundation mechanism, individual donors set up a specific amount of money as a fund with the foundation, and then direct where the earnings will go. Legally, all donor advised grants go through the board first for approval, but the board typically approve everything that's within the foundation's guidelines. In practice, this makes donor advised funds essentially mini-foundations.

Donor advised funds typically result in a large volume of small grants. To reduce the overhead involved in supporting this volume, foundations often provide an online donor portal functionality to allow donors to view their fund balance, view what they've spent, choose what organizations they'd like to donate to, and "checkout" their donation online via an ecommerce metaphor. This ability for donors to self-manage their funds online helps streamline the process for the community foundations, and allows the donor an ease-of-use that helps the foundation to attract their money.

When using an online donor portal model, the community foundation would simply do a bit of due-diligence (for instance, checking to make sure the organization is a 501(c)3) on each grant, run it by the board, and then cut a check to the organization.

Reporting
When the original donor is involved, grantee reporting requirements can become more complicated. Some donors want to hear specifically what's been done with their money, thus requiring detailed itemizations from grantees, or aggregate reporting by the foundation.

Accounting
The accounting processes required to track the (often restricted) money flowing into a community foundation, as well as outgoing money are substantial. See the overall Accounting section for more detail.

Other Specialized Needs

Scholarships
6 of 25 interviewees mentioned scholarships during the interviews. While for the most part, foundations found the process for giving scholarships similar to that for giving other grants, some of the specific issues discussed were:

- 3 interviewees wanted to receive or track scholarship information online, and 2 of them found an online process to be useful for pre-screening the applicants
- 2 interviewees said that they prefer not to enter the huge volume of scholarship applications they receive into a grants management system. One interviewee solved this problem by creating a separate database for applicants, and another entered only winning recipients into the database
- 1 interviewee mentioned that some systems are difficult to use to process scholarship payments, as many scholarships are not paid directly to the applicant

Tracking Volunteerism

Corporate foundation sometimes track all of the hours volunteered by their employees and report it as part of their overall contribution to their community. However, none of the corporate foundations we spoke with had a desire to track this within their grants management system.

3 interviewees mentioned volunteers, and 2 of them ask their employees to use VolunteerMatch to track their hours. Both mentioned that their employees are not very reliable in entering this data: "You need to remember to go in after you're done volunteering and put the hours in, so I'm not sure how effective it is at capturing all of that." The third person said it was too difficult to track volunteer hours.

"You need to remember to go in after you're done volunteering and put the hours in, so I'm not sure how effective it is at capturing all of that."

Matching Gifts

When a corporation matches the donations made by their employees, the associated corporate foundation often tracks these matching gifts as part of the overall money they give. 2 interviewees used software to track matching gifts programs – one tracked them in her core grants management system, while the other had a custom Access database just for this. Functionality desired from a matching gifts system by at least one of these interviewees including the ability to:

- Track employees who donated, employee status, donation amount, and organizations donated to
- Track how much each employee has donated and flag those that have surpassed the donation amount that can be matched
- Track matching donation gift date, check number, and pay-to information for the organization
- Report on the matching gifts by employee and board members – for instance, what percent have donated? What is the average gift size?
- Be able to batch together multiple matching gifts to the same organization

Personnel Involvement

Who Uses the Grants Management System?

Foundations had different approaches to how the grants management system was used by the organization. Of the 16 foundation staff members we asked about system usage:

- 6 said the system was used by most of their organization
- 10 confirmed that program officers were using it
- Another 2 said that the program assistants worked in the system, but program officers generally did not
- For the other 4, the system was closely held and used by only a single person or a pair of people – although all 4 of these interviewees worked with quite small foundations, and it's unclear if there were additional people working in the grant-making area

Most of the interviewees who worked for foundations with more than a few staff members had someone in charge (often part time) of the grants management system and the data within it. Only a few of the very largest, however, had a dedicated grants management team.

Data Updates and Security

For several, the idea of allowing many to update the data in the system was worrying. One mentioned that it was better to have one person do data entry in order to maintain the data integrity. Another said, "I'm worried what would happen if program officers were in the system. They're idea people." And a third: "I'm a little leery, because I'm in charge of the data. If someone hasn't been doing this for a long time, they just don't know." On the other hand, one pointed out "People don't want to key data in, so they're not going to do things they're not well equipped to do."

The ability to set permissions around specific fields was seen as a possible solution to this problem. 11 interviewees – including 4 of the 6 consultants – mentioned the desire to be able to define which users were able to view, edit, and delete which types of data. Several commented that many systems don't provide strong support for this. As one consultant said, "Field level security - that's just such a big deal. You can have the program staff put in everything . . . but you can't [edit] the tax status . . . We want you to touch these fields but not those . . . I can't tell you how many reports we run just to find out if someone changed something."

"I can't tell you how many reports we run just to find out if someone changed something."

3 interviewees also mentioned that an audit log – a record of who changed what in the system – could be helpful in maintaining high quality data.

Providing User Specific Data Views

A number of people mentioned that ease-of-use – especially, the ability to easily look up information - was key in trying to get staff members through the organization to use the system. Many – 11 interviewees – felt that a system that provided views of data that were specific to a user's role or even their own workload would be useful in filtering down the amount of information that each staff member needed to process.

For instance, 5 people mentioned that a pared down version of the interface would allow executive directors or program officers to quickly look up key information, without "getting enmeshed in the system" – while still giving data specialists access to the information they need. As staff member said, she'd like to "customize some of the screen to really minimal stuff for someone who doesn't use it that much. So when you open it up a really simplified version of a page or two would just pop up and there's a simple way to do your query and then you just have what you want to look at. That would be nice."

"I'd like to customize some of the screen to really minimal stuff for someone who doesn't use it that much."

4 mentioned that a "dashboard" or "portfolio" concept, where each user is shown an overview of the grants or activities that apply specifically to them, can go even further in tailoring the interface to make the system very easy to use.

Encouraging Adoption

At a higher level, several interviewees mentioned that it was critical to help users of the system adapt to the new technologies, and incorporate it into their jobs. Several reported issues in getting staff to use the system.

One foundation staff member said that much of success with a grants management system was managing the culture change: "At the end of the day, having an information system is about 20% of the solution. The 80% is the culture change of how the people work. If you can't manage the cultural shift of the organization- to get the people to actually want to do it differently and to start using these new processes and this new information system . . . then they're not going to do it. If you don't manage the cultural change and the training, then it's not going go anywhere."

"Having an information system is about 20% of the solution. The 80% is the culture change of how the people work."

Customization

The need to be able to customize a grants management system to a foundation's specific needs was a key overarching theme of the interviews. 23 of the 25 interviewees brought up the need to customize the system – for instance, to tailor their application process, to create custom reports, or custom mail merge template.

For 5 interviewees, customization was a key decision factor in considering different grants management systems. For instance, one foundation mentioned that one of the main reasons they liked a product was that it was out-of-the-box product that could be substantially customized, while another decided not to use a product because the field names could not be changed.

"[The process] needs to be fairly customized to the organization- not just on intake, but on every step of the way."

Some of the key areas that organizations wanted to be able to customize included:

- 18 interviewees mentioned the ability to be able to tailor reports or create ad-hoc reports
- 9 interviewees wanted to be able to customize the workflow, comment, or scoring process as part of the review process
- 8 interviewees mentioned customizing the application process to the specific questions or workflow for their organization

Interviewees mentioned the desire to customize a few things at a high level in addition to the more specific things that have been broken out by section above – in particular, the field names, and the look and feel of the interface itself (particularly for externally facing interfaces like an application form). One interviewee also mentioned that it was important that your customizations not break in a new update of the software package.

2 of the consultants mentioned that the ability for a foundation to customize the application themselves, as opposed to needing to go back to the vendor for that (especially at additional cost) is a key concern. On the other hand, one of the foundation staff members was very satisfied with a process that involved asking the vendor for customizations – the vendor was very responsive to her requests and did not charge additional fees for these customizations.

Support for Custom Business Processes

For many, one of the key reasons to customize a grants management system was to adapt the system to the foundation's business processes and current practices. A few foundations mentioned, however, that they felt it would be useful to instead adapt some of their processes to the system. One said, "I think we should be looking for a package that's more standard and less customized. I just don't think we're as special as we'd like to think we are. We'd have to change some things about our business." Another foundation had gone some distance down a custom-build route because they wanted to be able to support their current process without changes, but when they had trouble with that, they decided they didn't need to be so rigid about their process, and could change some things to adapt to a packaged system.

We asked the consultants about this specifically – whether foundation needs are in fact quite different, with the need for substantially tailored systems – and their answers were illuminating. All but one felt that foundations tend to overemphasize their custom needs.

One said, "I think [foundations] are very similar with small tweaks. You don't say that. You never, ever say that. I have not met a funder yet who wants to say 'Oh, we are like everyone else.' There is a terminal uniqueness that is really hard to navigate sometimes."

Another interviewee emphasized that foundations should be ready to consider changing their processes as a way to save costs over time. A third mentioned that custom systems are often "a reaction to wanting to keep their process exactly the way it has been" rather than adapting to packaged software.

"I think [foundations] are very similar with small tweaks. [But] you don't say that. You never, ever say that. There is a terminal uniqueness that is really hard to navigate sometimes."

A different 5 consultants mentioned that foundations sometimes have a hard time stepping back and evaluating their processes, and so may continue with practices that are no longer useful – and may in fact look for grants management systems to support these outdated needs. They emphasized that the industry is changing, and it's important to continue to assess and adapt processes.

However, the consultants also acknowledged that there are some real differences in needs between foundations. In particular, they mentioned that needs of community and corporate foundations tend to vary from private ones, and that competitive vs. noncompetitive grant-making processes can be substantially different. At a foundation level, they felt that customization was of course important, with a particular emphasis on customization of the application and review workflow, coding, and reporting.

Support & Maintenance

When asked interviewees about their experiences with support and maintenance, 12 of 25 interviewees raised the issue of costs for both external and in-house support. Some interviewees viewed support costs as essential: "We are paying for platinum support – it's worth the expense to ensure they can keep the system up and running" while others were frustrated by a vendor's "pushback and extra costs" for many of the things they wanted to do.

4 interviewees had concerns about the amount of domain knowledge of the support staff. One simply said, "You need a vendor who can understand the actual issues described by the foundation" and another interviewee found a solution in contacting other foundations that using the same system for references and support.

8 interviewees were generally satisfied with the support they received. Among the attributes of good service were:

- 5 interviewees mentioned quick response time
- 2 interviewees mentioned that their vendors solicited and incorporated feedback from users

5 interviewees were somewhat dissatisfied with support. Among the complaints were:
- 2 interviewees mentioned slower response times or more complicated procedures due to the larger size of some vendors
- Other reasons for dissatisfaction were surprise costs, and insufficient resources to respond to a widespread problem like difficulty with upgrades

Only 2 of 25 interviewees mentioned using in-house support staff. In fact, when asked how much staff time their foundation devoted to maintaining their grants management system, a number of interviewees weren't sure what the question meant. Instead, most interviewees depended on the support and maintenance services offered by the vendor.

This extended to updates to the system. Several mentioned that they would prefer to go through the vendor to do any necessary updates to the system functionality.

Training

6 of 25 people interviewed mentioned training as a high priority and 1 person said that training was a "critical decision factor". While searching for a vendor, interviewees mentioned the following considerations:

- **What type of training will it be**? Among the different types of training interviewees mentioned conferences, seminars, in-house training (conducted by internal staff members), and online training or webinars. 4 people said their vendors offered online training, and 1 interviewee wished they had the option for webinars.

- **How much will it cost**? 7 people raised the issue of price, and 1 person stressed the importance of including training in the budget for set-up costs. The cost of training may vary widely across vendors. 2 interviewees mentioned high charges for training, especially for in-house training where the vendor can charge additional fees for travel expenses. On the other end of the spectrum, 2 interviewees worked with vendors who offered free training included in their service.

- **How clear are the documentation and manuals?** 3 people mentioned documentation as an important consideration, and 1 interviewee said their organization hired a new staff member to create additional documentation. Beyond printed materials, 1 interviewee expressed an interest in customizing the in-application help menu.

Technical Infrastructure

Looking beyond features and ease of use, this section reviews some of the more technical aspects of choosing, installing and maintaining a grants management system. Two aspects to consider when searching for new software is whether it is hosted or installed and its compatibility with other software and operating systems already in use at the foundation.

Hosted/Installed

When asked whether they would be comfortable having their data stored remotely and accessed via the Internet, interviewees had mixed, and often strong, reactions.

With a hosted tool, staff are no longer "tied to their desk."

9 people in general thought that hosted solutions were useful, and 4 people said that they would specifically look for a hosted package. Among the positive attributes people mentioned:

- 5 liked the idea that you can access it from anywhere, which is beneficial for distributed staff and board members. As one foundation staff member said, with a hosted tool they don't have to be "tied to their desk" on grant deadline day
- 2 people cited cost savings of not needing to have in-house staff support
- 1 person mentioned that you don't need to install any additional software
- 1 person mentioned that a hosted solution makes it easier to integrate front-end grantee data with back-end staff processes
- 1 person mentioned that with an online system you can more easily aggregate data across foundations
- 1 person mentioned that a hosted solution would keep the data safe in the event of a foundation disaster

"I want our information to be on our servers."

6 of 25 interviewees in general thought hosted solutions were a bad idea, 3 of whom said they would never consider a hosted solution. Another 3 said that their organization originally had concerns about a hosted solution, but overcame them. Main cons:

- 6 people mentioned security and confidentiality issues in general – that unauthorized people (anyone who could figure out "the magic word") would be more likely to be able to access their data if they used a web-based system. For 2 people, this concern ruled out the possibly of using a hosted solution
- 4 people were worried about not having control over the data – for instance, if the software vendor went out of business – "I wanted our information to be on our servers"
- A few mentioned ease of use concerns: slower, less robust interface or staff's lack of experience with online tools

- A few were uncomfortable with the fact that a hosted solution relies on staff member's Internet access and is dependent on the disaster preparedness of the vendor

For a number of the interviewees, the concerns seemed more conceptual than based in experience. For instance, one consultant said "That scares them- the whole online thing."

Because some felt so strongly about security issues, we asked others specifically whether they had concerns in the area. 8 people felt it wasn't an issue, because:

- Outsourcing is common (4 people mentioned other outsourcing projects which increased their confidence in a hosted solution)
- 5 people mentioned that there is already a lot of transparency in this domain. 1 interviewee said "Anything that a grantee is giving is already public record like on Guidestar" and another agreed that security shouldn't be a major concern because "It's not like the finance industry. We're not taking credit cards"

Setup, Configuration & Migration

When we asked questions about the set-up, configuration, and data migration of their grant-making system, many interviewees reported negative experiences. The most commonly discussed issues included revolved around the data itself - 7 different interviewees mentioned that data migration has been difficult for them, or that it is often underestimated. One mentioned that her organization has been in the process for migrating data for more than a year; another said that they vendor had estimated migration as a month of effort, but the process was still not done after 6 months.

This underestimation of data integration extended to the cost. Although 2 interviewees described their vendors' set-up costs as a flat fee, bundled with other services, charges by the hour were more common. One consultant said the vendor's experience with data migration should be a critical decision factor when considering different software packages, as underestimated migration costs can result in a bid that looks much lower than it actually will be. As she said, "They might say, 'Oh, we'll need to look at it more in depth, and charge you hourly, but it will probably be a couple thousand.' It's never just a couple thousand."

What can help with the migration process? Although one foundation staff member mentioned that a better data import utility (in particular, one that better handled duplicate records) would be useful, for the most part interviewees talked about processes rather than features:

- 4 interviewees said that it was important to carefully identify the correct mapping when moving from one system to another.
- 3 interviewees discussed the importance of taking enough time to "clean" or standardize the historical data before importing into the new system

> "They might say, 'Oh, we'll need to look at it more in depth, and charge you hourly, but it will probably be a couple thousand.' It's never just a couple thousand."

Customization was another important topic among interviewees. Of the 7 interviewees who discussed customization, 6 described it as a complex and difficult process and only 1 interviewee described the process as easy. Issues raised about customization included:

- Customization needs beyond what was expected during initial planning
- Limitations to what can be changed without the help of an in-house programmer or consulting services from the vendor
- Difficulty determining what kind of changes need to be made for the desired result, or are possible within the system

3 people mentioned integration with external systems – for instance, with accounting systems – as a key part of the setup process.

Interoperability with other Systems

Although we didn't ask about it specifically, 18 of 25 interviewees mentioned the importance of exchanging data between multiple systems. Some of the key reasons:

- 8 people wanted to exchange financial data with accounting software (either automatically, or simply by manually exporting and importing data files)
- 6 interviewees wanted integration with Microsoft Office or other desktop suite applications
- 4 people wanted the flexibility to create reports with other tools like Crystal Reports
- 3 interviewees wanted integration with a CRM or fundraising management system like Raisers Edge
- Interviewees also mentioned integrating with other software including Access, donor management tools, and statistical analysis tools like SPSS

3 consultants also expressed concerns about how software or operating system upgrades might interfere with data exchange. One interviewee was particularly concerned about vendor commitment to making software updates as necessary to allow their system to exchange information with common applications like Outlook or Microsoft Office.

3 interviewees, 2 of them consultants, stressed the importance of APIs or open access for data exchange. One interviewee said, “The challenge will always be the proprietary issue and whether or not we are talking about open architecture. And whether or not the vendor [is] amenable to that kind of change. Everybody is so worried about data integrity and that’s always the challenge. It’s a major nightmare.”

“The challenge will always be the proprietary issue and whether or not we are talking about open architecture.”

Custom Systems

As discussed earlier, customization was a key theme in our interviews. 3 of the 19 foundation staff members interviewed had taken customization to its logical extreme: they had built custom systems as their primary grants management systems. A number of other foundations were using small custom Access or Filemaker databases as adjuncts to their primary systems. For most, they were using these custom systems to track information that couldn't easily be stored in an off-the-shelf system. For instance, one organization that was using a custom primary system had an unusual process which involved collecting a huge amount of survey data from grantees.

Another very large foundation had built a custom system because their needs were too complex for most off-the-shelf systems. 2 of the consultants mentioned as well that it was the larger foundations that were most likely to be using a custom system, and typically those with very unique needs. One consultant mentioned that it's becoming less common for foundations to custom build software.

The third foundation with a custom-built primary system did substantial research into off-the-shelf solutions. The ability to control and customize the system was a primary factor in their decision to custom build. She mentioned that they didn't want to spend all the money to figure out how the vendor's processes would work for their own processes – instead, they chose to invest in a solution that could be tailored precisely to their needs.

All 3 who had custom built solutions invested considerable resources into it. One estimated the cost of the build as about $120K, while another said theirs was upwards of a million dollars. One of the interviewees emphasized the amount of work involved specifically, saying that it was a huge ongoing commitment.

Costs and Other Key Factors

Costs

Surprisingly few interviewees mentioned cost as a key criterion in selecting a software package. None of the users who had recently evaluated software mentioned cost as a key factor in their selection. Only 4 interviewed (3 of them consultants) mentioned cost as decision making factor at all. A number of participants were willing to share with us what they paid per year, but in general they offered few comments about those fees.

While it could be that the participants felt that cost was too obvious a factor to mention, in our experience with software packages in other nonprofit sectors, price is brought up early and often as a key driving force in decision making, and asking about fees often opens a lengthy discussion about what their fees cover and whether or not the organization perceives these fees as worthwhile. The relative lack of thoughts about fees in this set of interviews seems to us to be significant.

Surprisingly few interviewees mentioned cost as a key criterion in selecting a software package.

The actual costs paid for purchased software and the feelings about those costs (from those few who shared them) varied dramatically. One small foundation said they were paying about $3000 per year, and found that very expensive, while several larger foundations said they paid $100,000 or more per year, and found that cost fairly reasonable.

Those few people we interviewed who had invested substantial resources in custom solutions were more likely to mention the cost of a packaged solution as a factor. One interviewee in the midst of custom development mentioned that the foundation would need to pay $80 - $100K to get started with a package that would work for them, and then another $25K yearly for maintenance – and they wouldn't be able to customize any of it. On the other hand, they had already spent about $120K on their custom development project and were not yet done. Yearly license fees seemed to be of particular concern for those doing custom builds – a different interviewee mentioned that they were more inclined to pay for custom work as it felt like a choice, while a yearly support and maintenance contract felt like an obligation from which they don't receive much value.

Several mentioned add-on costs as a concern, and said they felt, for instance, that there was "nickel and dime-ing" or "pushback and extra costs" from the vendor for many of the things they wanted to do.

The things related to grants management that respondents mentioned they were paying fees for were:

- Initial fees, to purchase the system
- Setup and migration fees – for instance, for data cleaning, mapping, or import

- Customization fees. Some vendors have an installation package that includes some initial customization, but most foundations reported hourly charges for both initial and ongoing customization work. This customization might be minimal – such as the creation of custom codes and reports for a foundation – or very considerable, such as business process work to map the system to the current process, integration with other software packages, custom development work to add new functionality to the system, or more. Several respondents were concerned that they weren't able to do customization themselves, and thus were forced to pay vendor fees whenever something needed to be changed
- Yearly or monthly license fees, typically priced by the number of internal users using the system. For online systems, this may be the primary cost for the system, with little or no initial fees
- Fees for support. These are typically included in a yearly maintenance fee. For some systems, these fees were options, while for others they're mandatory
- Fees for upgrades. Like support fees, these are typically included in a yearly maintenance fee, and may be optional or mandatory
- Add-on fees per module. Many of the applications in this space have a number of additional sets of functionality that require additional fees
- For the online systems, particularly those that focus on online application systems, a number mentioned costs per application, or costs per **external** user as well as foundation users. One person mentioned that for them, the overall price of a system that priced by overall user accounts was dramatically different than one that priced by application
- Document storage fees. Particularly for online, hosted applications, there may be fees for document storage, generally based on the total disk space used
- Fees for training classes. A few mentioned that options for online training or getting a group of foundations together and paying for vendor training together can save on training fees

Other Key Factors

10 interviewees specifically mentioned overall ease of use as an important factor in choosing a grants management system. The key advantages mentioned for an easy-to-use system were less training required, and the ability for all staff to use the system.

5 of 25 interviewees mentioned company background as an important decision making factor when choosing a software vendor. 3 interviewees were most concerned about vendors' financial stability and success, since according to one interviewee, "There's been a huge amount of vendor coming and going, which means people should take vendor stability particularly seriously."

"There's been a huge amount of vendor coming and going, which means people should take vendor stability particularly seriously."

Among the technical considerations involved in selecting

GM software, 3 interviewees mentioned the need to find software that will work on Macintosh computers. One interviewee said, “Smaller foundations don’t want to be locked into one computer: Mac vs. PC. No one wants to change their system for one piece of software.” However, as one interviewee mentioned, the more limited range of options for Mac users may become less of an issue as more foundations upgrade to newer Intel Macs, which are able to run both the Windows and Mac operating systems.

Perspectives on the Overall Grants Management Marketplace

4 of the 6 consultants, as well as one foundation staff member, expressed the feeling that there weren’t as many software options as they would like in the grants management space. Several mentioned GIFTS’ domination of the grants management space as a negative force in the market. For instance, the foundation staff member said “I have this resistance toward GIFTS, just because it’s such a market dominator,” and said she’d prefer to work with a nonprofit organization that provides a software package, as it would be more aligned with their mission. One of the consultants commented that many foundations have to buy really large pieces of software because the small systems that would better suit them don’t exist.

2 consultants mentioned that the market was slow to move: a “slow luxury liner to right its course,” as one said. This was a source of frustration – “Why has the market been so slow to adopt appropriate technologies?” – and one mentioned that it may discourage visionary people from working in the space.

2 different consultants talked about the amount of churn in this market – they felt that the number of vendors that were starting up and going out of business was unusual. One hypothesized that many vendors underestimate the difficulty of this market - the complexity of foundation needs, foundation’s expectation of support, how complex it is to migrate data, how long it takes for a foundation to make a decision, and how thrifty foundations are.

“Why has the market been so slow to adopt appropriate technologies?”

Looking Forward

This report provides a relatively unpolished look at the results of our interview research. It summarizes grant-makers' complex needs and concerns for grants management software, and provides relatively comprehensive list of the characteristics that define a robust, effective grants management system.

Overall, grant-makers want a system that will easily support their core processes, such as receiving applications, writing letters, and creating reports, while being flexible enough to support their own custom needs. Online functionality and help with workflow and reminders are very useful additions for most. Some organizations want support for more sophisticated functionalities for external reviewers, document management, integration with accounting, or more niche functionalities like donor advised fund portals or the tracking of scholarships.

However, this is only one piece of a larger research project. These findings, as well as the findings of our Grants Management Software Survey (available at http://www.idealware.org/gm_survey.php), will be incorporated into a more polished and accessible Consumers Guide to Grants Management Software. This Guide will provide a summary of the features that many grant-makers will find useful in grants management software, and a detailed look at how well the software package meet those needs.

About Idealware

Idealware, a nonprofit organization, provides candid Consumer-Reports-style reviews and articles about software of interest to other nonprofits and the philanthropic sector.

Through product comparisons, articles and reports, online seminars, case studies, and software news, Idealware helps organizations choose the software that will allow them to be more effective.

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