

Grants Management Software and Service Providers – 2009

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

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

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

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

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

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

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

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

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

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

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

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

CAMT – www.egrant.org

Common Grant Application - www.commongrantapplication.com

* CyberGrants – www.cybergrants.com

Dulles Technology Partners – www.dullestech.com

Grantium – www.grantium.com

GrantStream – www.grantstream.com

PowerOFFICE – www.poweroffice.info

Stellar Financial - www.stellarfinancial.com

WESTAF – www.westaf.org

* Vendor with significant market share invited but declined to report